

 <p><b>Copeland</b> borough council <i>Proud of our past. Energised for our future.</i></p> <p><b>JOB PROFILE</b></p>	Job Title	<b>Trainee Accounting Technician</b>
	Job Family	<b>Apprentice</b>
	Salary Grade	<b>Voluntary Living Wage</b>
	Directorate	<b>Commercial and Corporate Resources</b>
	Department	<b>Financial Services</b>
	Ref No	
	Date	<b>24th October 2016</b>

### 1. MAIN PURPOSE

As an apprentice, this post will support senior finance staff in providing a finance service to other officers of the Council, particularly budget holders and managers. To provide the finance team with appropriate finance and administrative support as required.

### 2. POSITION IN ORGANISATION

Responsible to: Strategic Finance Accountant

Employees responsible for: None

Context: See organisation structure chart

### 3. EMPLOYMENT BASE

Whitehaven, Cumbria

### 4. BUDGET/FINANCIAL RESPONSIBILITIES

None

### 5. SUMMARY OF MAIN DUTIES AND RESPONSIBILITIES

With close supervision and direction, the post holder will be required to;

1. Keep routine financial spreadsheets up to date to aid in the production of financial and performance information

2. Enter data into financial systems, including general ledger, debtors, purchasing and creditors. (examples include journal transfers, budget virements, raising invoices, entering budget profiles based on information provided by other finance staff
3. Retrieve financial data, routine checking of financial systems to assist in providing analysis of financial information, investigating financial data and transactions, producing reconciliations etc.
4. Ad hoc enquiries on the finance systems to support team members, service department clients and suppliers
5. Carry out general office duties such as routine photocopying, mail delivery, telephone queries, filing, archiving and assisting senior colleagues
6. The role may involve occasionally handling small amounts of cash, processing cheques and invoices
7. Undertake responsibilities in accordance with appropriate legislation and regulations, codes of practice, the provisions of the Council's constitution and its policies and procedures
8. Supporting finance officers involved in Health & Safety duties e.g. helping with general office risk assessments and recording of health and safety information
9. Undertake other duties appropriate to the grade of the post with suitable training and support
10. To undertake a course of study leading to the nationally recognised Association of Accounting Technicians qualification
11. To actively assist in the introduction of new systems and techniques to generate efficiencies and improved ways of working.
12. To be involved, as appropriate, in the event of emergency situations occurring within the Borough.

## **6. CONTACTS**

Internal: Directors, Managers and Officers.  
There may be occasional supervised contact with Elected Members/Elected Mayor

External: Training Provider, AAT (or similar), and Suppliers

## **7. SPECIAL FEATURES**

Post holder is required to concentrate when carrying out financial tasks and when working on spreadsheets.

## 8. PERSON SPECIFICATION

Criteria	Essential**	Desirable
<b>Education and Qualifications</b>	<p>5 GCSE's A*-C (or equivalent) including English and Mathematics</p> <p>Willingness to complete the qualifications which are part of the apprenticeship</p>	A level Accounting Qualification
<b>Knowledge and experience</b>	<p>Experience of working towards deadlines</p> <p>Experience of working as part of a team</p> <p>Knowledge of using PC applications to include Microsoft Office</p>	<p>Experience of working within an office environment</p> <p>Knowledge of the roles within a finance environment</p> <p>Knowledge of using spreadsheets to collate and present statistical information</p>
<b>Job related skills</b>	<p>Demonstrates good communication skills</p> <p>Good typing &amp; keyboard skills</p> <p>Time and task management skills</p> <p>Appreciation of the importance of confidentiality in relation to accounting work</p> <p>Ability to pay attention to detail</p>	

## 9. PERSONAL COMPETENCIES

<p><b>1. Organisational Change and Forward Thinking -</b> <i>understanding and preparing for the business challenges ahead and responding to change</i></p>	<p><b>LEVEL: 1</b></p> <ul style="list-style-type: none"> <li>• Understands how their own role fits with the aims and objectives of the Council</li> <li>• Understands the current business challenges and change requirements</li> <li>• Responds and contributes positively to change</li> <li>• Identifies opportunities and suggests improvements for discussion</li> </ul>
<p><b>2. Managing Self and others -</b> <i>managing your own performance and that of others</i></p>	<p><b>LEVEL: 1</b></p> <ul style="list-style-type: none"> <li>• Accepts personal responsibility to achieve own work objectives, keeping direct line manager aware of progress and any changes needed</li> <li>• Contributes positively to the performance management process</li> <li>• Acts in accordance with the Council's Human Resources policies and procedures</li> <li>• Gives guidance and advice to employees new to the role</li> </ul>
<p><b>3. Service Delivery -</b> <i>delivering highly effective services</i></p>	<p><b>LEVEL: 1</b></p> <ul style="list-style-type: none"> <li>• Understands and recognises the service delivery standard required</li> <li>• Has the desire, ability and training to deliver 'right first time'</li> <li>• Builds and maintains positive relationships with internal and external customers and partners</li> <li>• Suggests improved methods of delivery</li> </ul>
<p><b>4. Managing Finance and other resources -</b> <i>using the resources and finance of the Council</i></p>	<p><b>LEVEL: 1</b></p> <ul style="list-style-type: none"> <li>• Uses resources available to achieve objectives</li> <li>• Adheres to/applies/gives advice and guidance on the Council's resource policies and procedures as appropriate to job role</li> <li>• Uses technology/machinery/vehicles and/or manages information as appropriate to job role</li> </ul>
<p><b>5. Customers -</b> <i>working with internal and external customers</i></p>	<p><b>LEVEL: 1</b></p> <ul style="list-style-type: none"> <li>• Knows who the customer is</li> <li>• Handles customers with patience and care</li> <li>• Focuses on meeting and delivering customer expectations</li> <li>• Responds positively and calmly to customer complaints, considering the potential impact of their actions on the Council's image</li> </ul>

<p><b>6. Communication -</b> <i>communicating internally and externally at all levels using a variety of approaches</i></p>	<p><b>LEVEL: 1</b></p> <ul style="list-style-type: none"> <li>• Communicates clearly, giving information in a way that ensures full understanding using the most appropriate communication method</li> <li>• Actively listens, using questioning to seek clarification of facts</li> <li>• Contributes objectively to team discussions</li> <li>• Observes confidentiality at all times</li> </ul>
<p><b>7. Team Working -</b> <i>working effectively with individuals and teams</i></p>	<p><b>LEVEL: 1</b></p> <ul style="list-style-type: none"> <li>• Supports and helps other team members as necessary</li> <li>• Is tactful and patient with team colleagues, respecting ideas and contributions different to their own and in accordance with the Council's equality and diversity policy</li> <li>• Works with others to achieve shared goals</li> <li>• Builds and maintains effective working relationships with other team members</li> </ul>
<p><b>8. Personal skills -</b> <i>demonstrating personal effectiveness, professionalism and personal integrity</i></p>	<p><b>LEVEL: 1</b></p> <ul style="list-style-type: none"> <li>• Takes pride in the job they do, paying attention to self-development, understanding and accepting his/her role in accordance with the Council's Health &amp; Safety policy</li> <li>• Is fully aware of how their own personal conduct and performance impacts on the image of the Council</li> <li>• Demonstrates respect and understanding of the roles of other Council employees working with them to achieve shared goals</li> <li>• Behaves honestly, with integrity and ethically and will challenge unacceptable behaviour</li> </ul>