

Client need

Our client had undergone a difficult reorganisation of its financial management, relationships between service managers and finance support had hit rock bottom and the Council was urgently required by the Audit Commission to roll out new budget management processes.

maltway was engaged to develop a supporting training programme to:

- Ensure a consistent communication of new budget management processes across the Council
- Reinforce/re-establish the respective roles and responsibilities of service managers and finance support
- Help service managers interpret budget reports and develop appropriate strategies and tactics to manage their budgets
- Improve the timeliness and quality of monthly monitoring returns
- Re-build trust between service managers and finance support.

maltway approach

Working closely with the project team, finance support and service managers our training programme needed to address both soft and hard issues.

Soft issues were addressed by training service managers and finance support together, working jointly on case studies and sharing their concerns and understanding of roles and responsibilities.

The hard content included:

- Review, discussion and clarification of financial procedures
- Developing joint responses to resolve in-year budget management problems
- Preparing high quality monthly budget commentary.

We led the delivery of each course supported by a business process expert from the client. This ensured consistent standards of delivery and participant engagement with local flavour and technical quality.

Outcomes

We ran 20 events over seven months, training 250 managers. Our client saw clear improvement working relationships and the budget management process was embedded with monthly reporting packs produced on time for senior management and councillors. In the following audit inspection the Council improved from 2 to 3 for financial management of resources.

Additional information

We have successfully used similar approaches to develop budget skills with many of our clients, often combining these with wider financial awareness programme or as a module for new manager induction.