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## Job Profile comprising Job Description and Person Specification

### Job Description

<b>Job Title:</b> Assistant Business Partner – Education	<b>Grade:</b> PO5
<b>Section:</b> Children’s Services Schools Finance Team	<b>Directorate:</b> Children’s Services
<b>Responsible to following manager:</b> Head of Service – Schools Finance	<b>Responsible for following staff:</b> Schools finance apprentice 2 x Schools finance officers
<b>Post Number/s:</b>	<b>Last review date: May 2021</b>

#### Working for the Richmond/ Wandsworth Shared Staffing Arrangement

This role is employed under the Shared Staffing Arrangement between Richmond and Wandsworth Councils. The overall purpose of the Shared Staffing Arrangement is to provide the highest quality of service at the lowest attainable cost.

Staff are expected to deliver high quality and responsive services wherever they are based, as well as having the ability to adapt to sometimes differing processes and expectations.

The Shared Staffing Arrangement aims to be at the forefront of innovation in local government and the organisation will invest in the development of its staff and ensure the opportunities for progression that only a large organisation can provide.

#### Job Purpose:

To support the directorates’ senior management, to manage the Dedicated Schools Grant in particular the High Needs Block and as well as enable budget managers and schools to deliver their budget management responsibilities. The post holder will be required to translate complex financial data to non-financial stakeholders and effectively challenge senior managers, in ensuring robust financial management of each business area.



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To provide direct financial support to the Directorates to enable them to develop their strategic financial plans and ensure that the future needs of the service are reflected in the Council's medium-term financial forecasts.

To support the Head of Schools Finance and Education Business Partner in the provision of high-quality financial advice and accurate and timely financial information to Corporate Directors, Heads of Service, schools and budget managers across the Directorates through day-to-day management and coordination of a service finance team.

To be a schools funding technical expert, particularly the High Needs Block.

### **Specific Duties and Responsibilities:**

#### **1. People Management**

- To coordinate several staff within the team, to provide an optimum level of service provision in accordance with the Council's policies, budget allocation and statutory requirements. This includes ensuring deadlines and timetables are adhered to for reporting, payments and other service requirements.
- To support the target setting, performance management, business planning and budget management for the Finance team.
- To support the responsible selection, development and performance of junior members within the finance team in line with the Council's HR policies.

#### **2. Customer Management**

- To work closely with the senior managers within the directorate so that they are fully informed of the financial position and risks for their services and take the necessary actions to stay within budget.
- To support the development of effective external working relationships with key stakeholders within the council to ensure the service has the knowledge and expertise to continuously improve its financial performance.
- To take the lead on developing and maintaining external relationships as directed by the Head of Schools Finance.
- To ensure high quality customer service, responsiveness, meeting of deadlines and accuracy of reporting and payments.



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### **3. Operational Service Delivery**

- Post holder will be working on Wandsworth Council finance functions only.
- Ensure that officers and members are provided with high quality financial advice and direction on financial strategies, policy, standards and practices, enabling service Directorates to make timely and well-informed strategic and operational decisions in the knowledge of the impact those decisions will have financially on the Council.
- To ensure that the services for are dealt with on an equitable basis to deliver the standards required for each, as agreed annually by the Executives of the council.
- Understand the business of the service directorate and the customer's needs and provide a finance service that adds value, and to assist in the development of structure, systems and policies to support service delivery.
- Ensure that Dedicated Schools Grant funding is well managed and effectively utilised. Value for money is a essential objective of all funding agreements and commissioned service arrangements.
- Produce high quality and well-presented financial analysis and management information for budget holders and the Senior Management Team as required.
- Support the delivery of productivity, efficiency improvement and cost reduction plans within the service Directorate, including change programmes and cross-cutting projects, and the identification and securing of new funding streams.
- The post holder will also be responsible for identifying financial issues within the service Directorate that require attention and seek resolutions to areas of financial concern to ensure expenditure and income is contained within the Budget. As directed by senior finance staff – to support the review of more complex and high-level financial issues.
- To ensure income is maximised, and invoiced for in a timely and accurate way, with effective monitoring and recovery processes in place and being followed. Ensure all grant income is claimed, monitored, and that grant claims are completed accurately and before deadlines, with accurate and complete working papers.
- To develop and support improvement projects within the Directorate from a finance perspective.



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- To support the Head of Schools Finance in ensuring that each Directorate complies with Financial Standing Orders and all other financial policies and procedures as directed by the Chief Finance Officer. Key to the role will be working with a variety of stakeholders including elected Members, Corporate and Divisional Directors, schools and budget managers.
- Operationally lead on the annual close of accounts processes, ensuring a robust plan is in place and followed, including planning effectively for deadlines, and that finance staff, and departmental staff and budget holders are informed of deadlines and requirements, and their responsibilities. Provide effective training, guidance and assistance to ensure the department's accounts are closed accurately and by set deadlines.
- To work with Corporate Finance colleagues as required to proactively support the production of strategic and medium-term financial planning information.
- To ensure that the statutory accounting requirements with respect to each Directorate are met and that legislative changes that may have financial impact on Directorates are covered.
- To lead on the work and review of complex and high level operational financial issues for specific service areas.
- To regularly represent as the finance expert at both internal and external forums.

#### **4. Service Planning & Development**

- Ensure clear Service Level Agreements (SLAs) are in place where appropriate, covering all aspects of service delivery with performance and response levels.
- To support the development of annual operational plans and budgets for the function or team so that there are clear priorities and appropriate resources are allocated to their achievement.
- To formulate and develop plans and budgets for particular areas of the team and input into the workforce planning process.

#### **5. Financial & Resource Management**



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- To support the development and implementation of budget plans across the Directorate, within legislative requirements and in compliance with the Council's policies, regulations and standing orders.
- To be a Dedicated Schools grant funding expert by ensuring that all operating and other schools' funding guidance are read and understood.
- Ensuring that High Needs data that drives High Needs funding to schools is maintained and schools are correctly funded for those pupils on roll with an Education, Health and Care Plan. This include reviewing the data within the SEN Placement Model / Database for accuracy.
- Using the SEN Placement Model / Database support the Education Finance Lead to ensure that the High Needs Block forecast is accurate.
- Ensure that the Dedicated Schools Grant (DSG) budgets in the accounting system match the expected funding that Wandsworth will receive in the year. Where required post budget virements to correct budgets.
- Monitoring the income and expenditure within the DSG on a monthly basis.
- Ensure that DSG payments are made on time by the communicated deadlines
- That all budget virements have been posted correctly and to the correct codes. Where necessary ensure that corrections are made.
- To ensure the provision of timely financial information in support of Departmental and Corporate performance monitoring requirements and to corporate timetables.
- To ensure all purchasing and procurement is conducted in line with the corporate guidelines with appropriate use of the Council's financial systems.
- To maintain high standards of statutory accounting and meet the Council's statutory and professional requirements.
- To ensure that all financial systems within the Directorate are fit for purpose, link with our Corporate financial systems, meet statutory requirements and financial regulations.
- To play a key role in supporting the delivery of productivity and efficiency improvement and cost reduction plans within the service Directorate, supporting transformation change programmes, and identifying and securing new funding streams.



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- To identify financial issues within the service Directorate that require attention and assist in the successful resolution of areas of financial risk and concern.
- To ensure the service Directorate has considered and is managing financial risk and ensure there are adequate reserves and provisions, reporting exceptions to the Head of Finance as necessary.
- To take a lead in resolving specific and complex financial issues within the service.
- To take personal responsibility for specific technical accounting issues within the team/service area as directed by the Head of Finance.

## **6. Continuous Improvement**

- To support the Head of Schools Finance and Finance Business Partner in the provision of financial input to the transformational agenda across the Council.
- Support the implementation of improvement initiatives and change programmes using the Council's Project Management and Service Improvement methodologies.
- To contribute to corporate areas of activity, organisational development and council-wide, cross-departmental strategies, projects or policies, as required from time to time.
- To undertake personal responsibility and the finance lead in transformational projects and change programmes as directed by the Head of Schools Finance and Finance Business Partner.

## **7. Contacts**

- Primary contact will be with other officers within the Council with financial or budget holding responsibilities and service users / residents and their representative bodies. The postholder will attend senior management, member briefings, committees and other stakeholder forums as directed.
- To develop and promote internal and external partnerships that reflect the Council's commitment to work in active partnership with the community, so that coherent and value for money services are provided.
- To be aware of and assist in managing effective cross-Directorate working relationships, while maintaining professional integrity and without compromising good financial and accounting practice.



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- To regularly attend member briefings, committees and other forums to represent finance on specific financial issues within the service.

### **8. Miscellaneous**

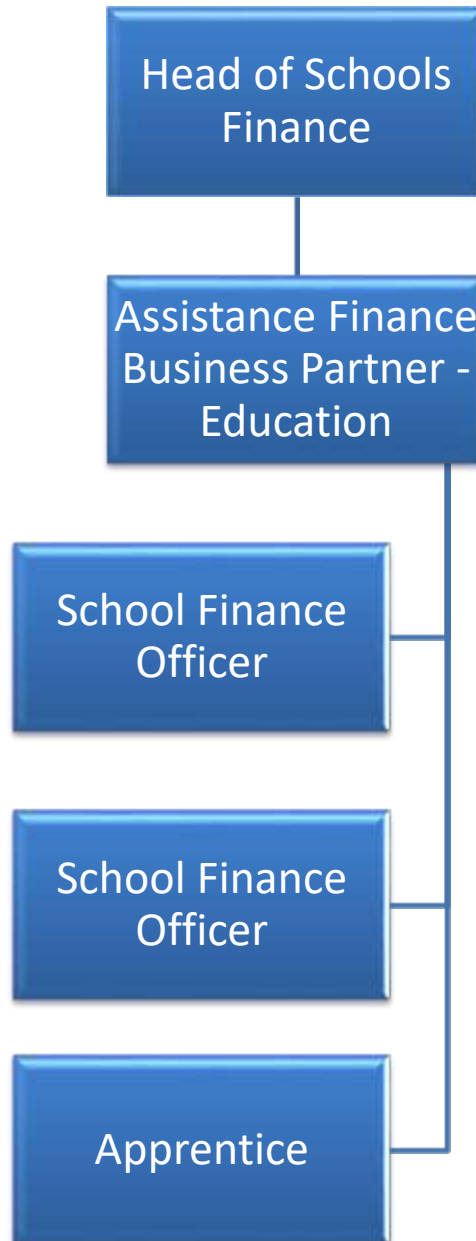
- Complete other reasonable tasks in order to fulfil role purpose or as instructed by management.
- To contribute to the continuous improvement of the services of the Boroughs of Wandsworth and Richmond.
- To comply with relevant Codes of Practice, including the Code of Conduct and policies concerning data protection and health and safety.
- To adhere to security controls and requirements as mandated by the SSA's policies, procedures and local risk assessments to maintain confidentiality, integrity, availability and legal compliance of information and systems.
- To promote equality, diversity, and inclusion, maintaining an awareness of the equality and diversity protocol/ policy and working to create and maintain a safe, supportive and welcoming environment where all people are treated with dignity and their identity and culture are valued and respected.
- To understand both Councils duties and responsibilities for safeguarding children, young people and adults as they apply to the role within the council.
- The Shared Staffing Arrangement will keep its structures under continual review and as a result the post holder should expect to carry out any other reasonable duties within the overall function, commensurate with the level of the post.



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**Current team structure**







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## Person Specification

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### Our Values and Behaviours<sup>1</sup>

The values and behaviours we seek from our staff draw on the high standards of the two boroughs, and we prize these qualities in particular:

- taking responsibility and being accountable for achieving the best possible outcomes – a 'can do' attitude to work
- continuously seeking better value for money and improved outcomes at lower cost
- focussing on residents and service users, and ensuring they receive the highest standards of service provision
- taking a team approach that values collaboration and partnership working

Person Specification Requirements	Assessed by A & I/ T/ C (see below for explanation)
<b>Knowledge</b>	
Knowledge of accounting principles and practices necessary to provide financial control and direction	A/ I
Strong analytical and technical skills and the ability to clearly present financial information in a manner appropriate to the recipients of the information.	A/ I
Knowledge and understanding of Dedicated Schools grant in order to provide financial control and direction	A/I

<b>Person Specification Requirements</b>	<b>Assessed by A &amp; I/ T/ C (see below for explanation)</b>
Knowledge and understanding of the Council's core objectives, and an understanding of the legislative frameworks and key issues relevant to local government financial management generally.	A/ I
Ability to extract and manipulate relevant financial data from the core financial information systems with advanced Microsoft Office skills	A/ I
Strong interpersonal skills including the ability to communicate with Members and senior management.	A/ I
Ability to provide constructive challenge and to exert influence	A/ I
<b>Experience</b>	
Experience of working with Dedicated Schools grants	A/I
Experience as a finance professional in a large and complex public sector organisation and an understanding of the annual financial cycle and regime within local authorities	A/ I
Evidence of developing financial strategies and project work in an operational finance setting and across service boundaries	A/ I
Experience of successful management of significant budgets in a comparable public sector organisation	A/ I
Experience in a management role in a multi-disciplinary organisation	A/ I
Experience of undertaking complex financial calculations including options appraisals, sensitivity analysis and variance analysis	A/ I
Experience of High Needs block accounting practices and understanding	A/I
Experience of designing complex spreadsheets and using them as models for decision making	A/ T
Experience of building partnerships and working effectively with a range of internal and external stakeholders	A/ I
Ability to effectively and proactively organise and prioritise own and team's workload, within defined requirements for the role	A/ I
<b>Skills</b>	
Significant experience of using standard IT packages (MS Office) and have ability to train and support others in their effective day-to-day use	A/ T
Excellent level of communication skills e.g. oral and written skills to provide clear and concise messages, financial advice, and financial reports	A/ T
Ability to simplify complex financial issues and present them in a manner that the recipient understands, and in a relevant format with the right level of information	A/ I
<b>Qualifications</b>	
Fully qualified Accountant - CIPFA, ACA, ACCA, CIMA	A/C



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Person Specification Requirements	Assessed by A & I/ T/ C (see below for explanation)
or equivalent experience	
Educated to degree level or equivalent	A/C
A minimum of 1 year's post qualification experience	A
Evidence of post qualification continuing professional development	A