**Data and Finance Analyst Job Profile comprising Job Description and Person Specification**

**Job Description**

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| --- | --- |
| **Job Title:**  Data and Finance Analyst | **Grade**:  PO3- PO4 |
| **Section:**  Property Services | **Directorate:**  Housing and Regeneration |
| **Responsible to following manager:**  Energy and Data Manager | **Responsible for following staff:**  0 |
| **Post Number/s:**  1 | **Last review date:** |

**Working for the Richmond & Wandsworth Better Service Partnership**

This role is employed under the Richmond & Wandsworth Better Service Partnership. The overall purpose of Richmond & Wandsworth 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.

Richmond & Wandsworth Better Service Partnership 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:**  
The Data and Finance Analyst plays a key role in supporting data-driven energy planning, financial management, and strategic decision-making through comprehensive analysis and reporting. This position oversees internal and external data sources, utilising advanced software and data management tools to collect, track, analyse, and visualise energy and financial data. The role ensures accurate monitoring of energy performance and financial expenditures, providing insights into cost efficiency, budgeting, and investment opportunities. By integrating financial analysis with energy data management, the role supports sustainable and fiscally responsible energy initiatives that align with organisational objectives.

Specific Duties and Responsibilities

**PO3**

* Maintain and manage key data sources, including inventories of buildings, assets, energy consumption, operational efficiencies, and financial expenditures tied to energy projects, ensuring data integrity and consistency across platforms.
* Monitor, track, and analyse energy and financial performance, identifying opportunities for cost savings, budget optimisation, and operational efficiency improvements by leveraging advanced analytical techniques.
* Utilise, customise, and maintain software tools and databases to collect, manage, and visualise energy and finance data, ensuring reporting accuracy, real-time data availability, and alignment with organisational priorities and compliance standards.
* Prepare detailed reports, dashboards, and presentations, translating complex technical findings and financial analyses into clear, actionable recommendations for leadership, colleagues, and external stakeholders.
* Respond promptly to data and financial analysis requests, providing tailored insights to support investment decisions, regulatory compliance, grant applications, and operational improvement initiatives.
* Collaborate with cross-functional teams including engineering, operations, and finance departments to ensure integrated data management and coordinated energy and financial performance strategies.
* Develop and maintain robust financial models, forecasting tools, and budget tracking systems to support project planning, resource allocation, and long-term strategic goals.
* Stay current with industry best practices, emerging technologies, regulatory changes, and professional development opportunities to continuously refine analytical methodologies, improve financial modelling accuracy, and enhance energy management strategies.

**PO4**

* Interpret and communicate data insights from utility meters, bills, facility operations, and financial reports to support strategic decision-making, sustainability planning, and operational improvements.
* Conduct advanced statistical modelling and forecasting, analysing energy consumption and financial trends to predict usage patterns, budget requirements, and long-term capital investment needs.
* Develop, implement, and refine analysis frameworks and key performance indicators (KPIs) that identify high-cost facilities, prioritize investment areas, and support the achievement of sustainability and financial objectives.
* Lead and manage data-driven projects, coordinating cross-functional stakeholder engagement to enhance reporting accuracy, ensure regulatory compliance, and optimise resource allocation for energy and financial initiatives.
* Provide actionable recommendations based on quantitative analysis to support energy efficiency programs, cost reduction strategies, and environmental impact mitigation efforts.
* Continuously evaluate emerging data analytics tools, industry trends, and regulatory changes to improve analytical capabilities and maintain alignment with organisational sustainability and financial goals.

**Generic Duties and Responsibilities**

* To contribute to the continuous improvement of the services of Richmond & Wandsworth Better Service Partnerships.
* 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 Richmond and Wandsworth 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 roles within the Councils.
* The profile is not intended to be an exhaustive list of the duties the post holder will carry out. Other reasonable duties commensurate with the level of the post, including supporting emergency and priority situations, will form part of the role.

**Additional Information**

N/A

**Team structure**

For the current structure please go to The Loop.

**Person Specification**

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**Our Values**

**THINK BIGGER**

**EMBRACE DIFFERENCE**

**CONNECT BETTER**

**LEAD BY EXAMPLE**

**PUT PEOPLE FIRST**

Our Values are embedded across Richmond & Wandsworth Better Service Partnership and throughout all roles and responsibilities at all levels of the organisation. Please [familiarise yourself with our values](https://www.richmond.gov.uk/media/afdbdeao/five_values.pdf) as they are an integral part of our recruitment and selection process.

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| --- | --- | --- | --- | --- |
| **Person Specification Requirements** | | | | **Assessed by**  **A/I/T/C**  **(see below for explanation)** |
| **Knowledge** | **Essential** | **Desirable** | **Assessed** |
| Understanding of building design and energy use concepts and metrics. |  |  | **I** |
| Knowledge of computer packages, including the Microsoft Suite and data software packages. |  |  | **T** |
| Understanding of basic accountancy i.e., debits and credits |  |  | **I** |
| Detailed working knowledge of CAFM systems such as Concerto |  |  | **I** |
| **Experience** | **Essential** | **Desirable** | **Assessed** |
| Experience of working in a busy environment working to tight deadlines |  |  | **I** |
| Experience organising and analysing large volumes of data |  |  | **I** |
| Experience applying a range of statistical analyses to practical decision-making contexts. |  |  | **I** |
| Experience of working in a finance, accounting or administrative role |  |  | **I** |
| **Skills** | **Essential** | **Desirable** | **Assessed** |
| Technically proficient in Microsoft Word and Excel and use of formulas |  |  | **I** |
| Ability to interpret data and reach  appropriate conclusions in a defined timeframe |  |  | **I** |
| Strong organisational/time management skills, with the ability to work under pressure and handle competing priorities in meeting deadlines and commitments |  |  | **I** |
| Ability to use web-based data visualisation tools (e.g., Tableau, Power BI, D3, Google Charts) |  |  | **I** |
| **Qualifications** | **Essential** | **Desirable** | **Assessed** |
| Bachelor’s, master’s, or other advanced degree in data science, computer science, mathematics, statistics, engineering, or related field |  |  | **C** |

**A – Application form / CV**

**I – Interview**

**T – Test**

**C - Certificate**