Role Title	Finance Business Partner – SEND Reform
Job Family	**Finance**
Competency Level	**Senior Manager**
Pay Scale	**PO10**

Purpose

Finance Business Partners are responsible for implementing the business partnering function for the assigned service area, in this case Special Education Needs (SEND), supporting delivery of the SEND reforms. The role is pivotal in providing strategic support in all aspects of financial advice for the service across the organisation. They act as partners with the service leadership teams to develop, constructively challenge, and support service plans and project delivery and take responsibility for managing and reporting on operational performance for the business partnering team. The post holder will be required to:

- control the deployment and allocation of service resources within the overall corporate and legislative framework and be accountable for the performance of the service area against agreed objectives;
- support the development of the budget for the relevant service area and contribute to wider service planning; and
- be professionally accountable for interventions within their area of responsibility.

The post holder will be required to assess situations from a commercial, business or finance perspective and provide appropriate financial advice to support complex business decisions. They will work closely with relevant stakeholders to ensure best use of limited financial resources, providing the strategic financial insight, intelligence and support required. They will produce high-quality financial analysis and provide robust assessment of financial risk to support decision-making.

As well as being an excellent technical accountant, the post holder will think strategically and support the organisation to achieve its objectives, being aware of the political and commercial context. They will think innovatively, focus on key priorities, and make clear decisions.

This role will be responsible for the implementation of SEND Reforms:

- Act as lead finance business partner for the SEND Reforms and associated transformation programmes, providing strategic financial advice to programme boards and senior leadership.
- Monitor and report SEND budgets, forecasts, risks, and mitigations.
- Support delivery of SEND improvement plans, deficit management plans, or transformation programmes.
- Analysing SEND cost drivers and identifying sustainable financial solutions, including developing financial models for long term impacts and scenario modelling.
- Reviewing SEND system and business processes for improvement opportunities.
- Working closely with SEND and Transformation colleagues to implement fully rounded financial and operational SEND Reform plans.
- Be the technical expert and have experience and detailed knowledge of all financial aspects of SEND and High Needs.

Generic Accountabilities	End Results/ Outcomes
Plan and ensure service delivery within a complex / diverse service area. Control operational activities within the service area and ensure professional standards are delivered.	The service is delivered to the quality, Council, professional and legislative standards required. Integrated service development and delivery is informed by client, partner and stakeholder views, latest thinking, good practice and legislative requirements. Corporate strategies are effectively implemented within area of responsibility. External inspections are managed effectively. Service delivers excellent customer service.
Manage responses to complex professional or politically sensitive issues within the area of responsibility. Manage key relationships with delivery partners /providers /suppliers to commission / manage / evaluate / enhance appropriate service delivery / capacity within area of responsibility.	Expert opinion, advice, supports and interpretation is provided on all aspects of the area of responsibility, including major decisions. Major issues are managed through to a satisfactory conclusion. Feedback and complaints procedures are developed and managed. Complaints are effectively resolved. Customer outcomes are clearly understood and specified. Services / goods are delivered on time, to budget and standards agreed. Opportunities to improve delivery / capacity of provision are proactively identified and actioned. Suppliers and supply chains are resilient and adaptable to meet changing needs. Expected operational efficiencies are realised.

Develops service plans to meet strategic business goals. Ensure compliance with all internal and external standards.	Service plan and targets for area of responsibility are developed from Council's overall strategic directives and agreed and communicated within required timeframe. Strategic and operational input is provided to wider business planning and development. Progress against objectives is effectively monitored and delivered.
Ensure the development and delivery of continuous improvements in all aspects of the service.	Improvements are developed and delivered effectively. Stakeholder requirements are met.
Lead, motivate and develop staff to create and maintain a highly competent and participative workforce.	The team is highly competent, effective, motivated and outcomes focussed. Recruitment, induction, development, performance reviews, employee relations and all HR processes and planning is completed to the required standards and timescales. Effective team meetings take place to required timescales.
Identify, secure, deploy and manage the resources necessary for the professional service area to meet/exceed its objectives.	Resources including, equipment, people, and systems are utilised optimally and efficiently. Annual budget is planned, developed and delivered. Value for money is maximised. Financial expenditure and financial integrity are controlled to assure regulatory and Council policy compliance.
Ensure the necessary standards relating to safeguarding best practices/protocols are effectively communicated, monitored and maintained.	Safeguarding standards are monitored and maintained in compliance with Council policy. Appropriate safeguarding training is provided.
Implement a risk management programme and advise on issues affecting Council service areas.	Business threatening situations are recognised, planned for and managed or escalated as appropriate. Systems and governance are in place to and respond promptly to critical events.

	Continuous service is provided.
Ensure the successful implementation of health and safety legislation, policies and practices.	Risks to staff and others are assessed and managed. Suitable health and safety instruction and training are provided. There is a safe working environment.
Job Specific Accountabilities	**End Results/Outcomes**
Interpersonal Build effective relationships based on trust demonstrating an ability to influence and work well with people across the organisation. Demonstrate good listening and strong interpersonal skills.	Strong relationships are built with key stakeholders. Conflicts are resolved effectively. Harmonious working with diverse groups of people. All interactions with stakeholders are kept positive.
Stakeholder management Understand the importance of effective stakeholder identification and management and communicate with stakeholders effectively, influencing where necessary, and adopting different styles of stakeholder intervention dependent on audience.	Good relationships are developed with service managers and all internal customers. Service managers are supported to produce clear and accurate budgets that are understood. Resistance is identified and appropriate strategies are applied to resolve issues. Trust and empathy is always shown to stakeholders. Service managers feel heard.
Understanding the business Understand key financial and other organisational levers, including objectives and key results, identifying what is important and the key factors that drive change and key decisions.	Finances linked to operations to support and inform organisational decision making.
Delivering change Work with the business and stakeholders to define and deliver change, both where Finance is delivering the change and where	Change is delivered effectively with required financial input and support.

support is being provided to wider organisational change projects.	Initiatives are identified, projects managed within clear time, cost and quality parameters. Resistance to change is identified and professionally managed and stakeholders are supported through change.
Adaptability Adjust, modify, or change in response to new circumstances, challenges, or changing environments, remaining flexible, open-minded, and capable of evolving in order to thrive and succeed in varying situations.	Uncertainty in the operating environment is navigated successfully. Change is fully embraced and supported. Role is performed to a high standard even in unfamiliar or unexpected conditions.
Using and exploiting data Make the best use of data from financial and other (performance) systems.	Accurate and reliable data is extracted to inform decision making. Accurate and reliable data is used effectively to solve complex problems.
Judgement Demonstrate critical thinking and problem-solving skills, both individually and collectively, avoiding "group think" and optimism bias.	Sound, evidence-based decisions are made. Timely and appropriate risk-based decisions are made.
Communication and the ability to influence Deliver competent written and verbal communications, including presentations.	All messages are communicated clearly and 'jargon' free.
Strategic thinking Think critically, see the bigger picture, and align actions with long-term goals and objectives. 'Horizon scan' risks, issues and opportunities over the short, medium and long term.	Potential challenges and opportunities for the long term are consistently identified. Decisions affecting services are aligned with "big picture".
Challenge Provide balanced and objective feedback and analysis/advice.	Appropriate and constructive challenge/feedback is provided to the organisation in a professional manner.
Technical Demonstrate effective, up to date, technical knowledge, a good grasp of the Financial Regulations, and good knowledge of wider financial regulations as they affect the sector, including a working knowledge of and ability to apply and interpret the CIPFA FM Code.	Finance support is provided to the organisation in line with its Financial Regulations and sector best practice.
Business and strategic planning	Solid financial baseline position created.

Plan and engage with Finance colleagues and service areas effectively for strategic financial planning activities and drive the agenda with regard to transformation activity and savings-related initiatives. Use corporate knowledge, including understanding of immediate service missions / strategies / goals to inform financial advice and planning	Progress on the delivery of financial strategies is tracked and monitored effectively and consistently.
Reading the room Accurately perceive, interpret, and respond to the emotions, attitudes, and dynamics of individuals and groups within a given environment, recognising both verbal and non-verbal cues.	Information is delivered dynamically and is adapted to the audience. Informed decisions are made. Professional situations are navigated effectively.
Business insights Recognise the impact of knowledge to add value and create or improve something.	Processes, products, outputs and approaches are optimised to deliver best results.
Time management Demonstrate good time management skills.	High quality work is delivered within agreed timelines.
Business writing Structure reports effectively, including building a convincing executive summary with compelling arguments and good conclusions and summary.	Meaningful information is delivered in a clear, concise and effective manner. Reports contain effective organisation of ideas and clear expression of thoughts in writing.
Financial systems Deliver, develop and exploit relevant resource management systems and processes to support the organisation's financial policy, regulations, information requirement and end-user population.	Financial systems are resilient and fit for purpose. Financial systems support the organisation to achieve its objectives.
Planning, forecasting and budgeting Evaluate and quantify a strategically aligned plan, for a defined period of time, which may include planned sales volumes and revenues, resource quantities, costs and expenses, assets, liabilities, and cash flows, as well as non-financial information.	Organisational planning and budget setting is supported effectively.
Management reporting and analysis Deliver, discuss and report on the organisation's operations and financial conditions (including quality and sustainability reporting).	Quality management information is provided to the organisation to support planning and decision making.
Professional qualifications and awareness of public sector finance standards	Finance team is appropriately qualified.

Have appropriate professional qualifications and awareness of public sector finance standards for the role, which may be different and (amongst other factors) dependent on length of service and training history.	
Building relationships Build trusted and reliable relationships with individuals, teams and organisations, both within LBWF and externally.	Effective relationships with others are built and maintained.
Stakeholder relationship management Identify the value between different stakeholders and influence them through productive engagement, questioning and challenging in a constructive way.	Stakeholders are challenged constructively leading to better decision making and outcomes.

Key Activities

Key activities for a Finance Business Partner include:

- Providing an effective Business Partnering function to the organisation and contributing to the development of the policies, activities and service improvements required to deliver the function. First and foremost, acting as a critical friend to the service area for which they are responsible.
- Providing advice and support which demonstrates depth of knowledge, expertise and customer focus and being responsible for the provision of revenue monitoring, capital monitoring, budget setting (revenue and capital), Medium Term Financial Strategy (MTFS) setting, and closure of accounts.
- Managing financial services for the assigned service and providing oversight of operational budgets, providing support and healthy challenge as appropriate.
- Formulating financial policies and strategies, and reporting to senior management and stakeholders.
- Ensuring integrity of financial information and compliance with audit requirements.
- Leading operational budget streams, budget forecasting, risk management, and resource allocation.
- Managing financial targets, departmental business programmes, and performance reporting.
- Ensuring that financial information is assigned and balanced and is received by decision-takers at the appropriate level.
- Ensuring that financial data analytics are used where appropriate to better inform budget monitoring and longer-term financial planning.
- Working with services to ensure the accuracy of information input to systems and proper responses to system outputs.
- Collaborating with the relevant service to become a trusted adviser and developing and maintaining a detailed understanding of the service area being supported.
- Continually reviewing, updating and reporting on quantified financial risks and opportunities in the relevant service area, and advising on how the risks can be mitigated and the opportunities exploited.
- Assisting with the efficient and timely completion of specific tasks within the annual closing of accounts processes and ensuring that information presented in the financial statements complies with the CIPFA Code of Practice and reporting standards.

- Advising Heads of Finance and/or the Assistant Director Business Partnering of any matters that should be referred to the Chief Financial Officer in their S151 role on funding, financial management and accounting requirements in respect of the assigned service.
- Providing effective financial support to programmes and projects, including savings and other initiatives that have a transformative element to them.
- Collaborating with Performance to ensure that service performance data is consistent and understood.
- Acting as liaison between the relevant service and the Finance team.
- Acting as deputy for the Head of Finance when required.

Nature of Contacts

Senior managers, directors, members and equivalent level external contacts, key stakeholder's partners and providers, to identify/meet requirements, generate and co-ordinate original ideas and develop council and partnership wide policy and service delivery. To provide expert advice, guidance and support on highly complex/sensitive issues. Communicate changes in policy, strategies and working practice both internally and to partner organisations / stakeholders.

Build and sustain effective relationships with all internal and external stakeholders. Work in partnership with internal and external contacts to develop and maintain joint working and promote the Council position. Co-ordinate partnership working activities and internal / external working groups. Influence their decisions.

Procedural Context

Reports to Head of Finance, Children's & Education (PO12)

Manage highly complex / high risk issues within a framework of policy and regulatory guidelines. Objectives and targets are developed and agreed in line with service plan. High level of discretion and use of initiative in deciding what course of action to take. Exercise expert judgement in assessing complex stakeholder requirements, potential risk and managing quality assurance of service.

Expert knowledge and significant experience of SEND and High Needs services is required to resolve complex issues and proactively anticipate and mitigate problems. Design and develop innovative solutions which enhance the quality and efficiency of services and reputation of the council.

Occasionally the post will be expected to work from other locations.

Key Facts and Figures

Standard DBS check required.

Enable others to understand changes and developments in relevant area and learn new processes / procedures.
Responsible for ensuring contractors / providers deliver to agreed standards.
May manage project teams of both internal staff and external contractors / consultants.

Resourcing

Waltham Forest

Budget Responsibilities: Full responsibility for financial management and accountancy for the assigned service. Budget responsibility of up to £500k. Resource and budget management of programme budgets across Financial Services.

Supervisory Responsibilities: This role has no direct supervisory responsibilities but will supervise some tasks undertaken by other officers in the wider Education Finance team.

Knowledge, Skills and Experience

Essential

- Knowledge of accounting principles and practices necessary to provide financial control and direction.
- Strong technical and analytical skills.
- Knowledge of the key issues relating to local government financial management and the key challenges facing local authorities in the current financial climate.
- Ability to extract and manipulate relevant financial data from financial systems to support analysis and reporting.
- Excellent interpersonal skills and the ability to communicate with stakeholders at a senior level.
- Experience of building relationships and working effectively with a range of internal and external stakeholders.
- Excellent presentation and report writing skills and the ability to communicate clearly, including the ability distil complex financial advice into appropriate formats and write clear and concise reports.
- Experience of working in a complex organisation with competing priorities and the ability to manage workload and meet stakeholder needs.
- Significant experience of using MS Office (Word, Excel and PowerPoint) and ability to train and support others in its day-to-day use.
- Experience of providing advice and challenge to internal stakeholders, including budget holders, heads of service and senior management.
- Experience of undertaking complex financial calculations, including options appraisals, sensitivity analysis and variance analysis.
- Experience of supporting the production of annual accounts in accordance with relevant standards and timetables, supported by comprehensive working papers.

Desirable

- Experience of working within a business partnering model for a local authority or similar organisation, or demonstrable awareness of the requirements of working in such a model.
- Ability to provide constructive challenge and to influence at a senior level.

Indicative Qualifications

Essential

Fully qualified accountant (CIPFA, ACA, ACCA, CIMA) or part qualified with a demonstrable plan to achieve full qualification within 9 months

Evidence of post-qualification continuing professional development

Desirable

Educated to degree level or equivalent

The above profile is intended to describe the general nature and level of work performed by employees in this role. It is not intended to be a detailed list of all duties and responsibilities which may be required. This role profile will be supplemented and further defined by annual objectives, which will be developed in conjunction with the post holder. It will be subject to regular review and the Council reserves the right to amend or add to the accountabilities listed.