

<b>Role Title</b>	<b>Principal Finance Officer : Education</b>
<b>Job Family</b>	<b>Finance</b>
<b>Competency Level</b>	<b>Principal Officer/Manager</b>
<b>Pay Range / Scale</b>	<b>PO4</b>
<b>Purpose</b>	
A business focussed strategic financial advisory and support service to Education services.	
<b>Generic Accountabilities</b>	<b>End Result/Outcomes</b>
Plan and organise work to ensure the delivery of those aspects of the service for which responsible.	<p>Work is completed on time and to the quality and standards required.</p> <p>Changes to priorities are accommodated.</p> <p>Service is delivered to organisational requirements and reflects customer and stakeholder requirements, within organisational constraints.</p> <p>Professional and legal compliance is assured.</p>
Undertake / support consultation procedures. Identify issues, resolving as appropriate and escalating complex problems if necessary.	<p>Activities are undertaken according relevant guidelines / regulations / procedures.</p> <p>Customer / stakeholder views are available to inform recommendations.</p> <p>Data and measurements are accurately recorded.</p>
Collate process and analyse complex information. Ensure all required records and information are maintained correctly.	<p>Information / applications are processed according to procedure.</p> <p>Information is managed efficiently and accurately.</p> <p>Data is recorded and stored in compliance with national standards and can be shared, as appropriate, with other agencies.</p>
Prepare and present results / responses / reports / recommendations.	<p>Accurate, complete and relevant information / reports are provided for internal and/or external use.</p> <p>Issues are clearly summarised, progress and implications are reported.</p> <p>The council's position is clearly stated.</p>
Provide authoritative advice, guidance and support to colleagues, customers and stakeholders. Respond to and investigate enquiries / escalated complaints.	<p>Information, advice and support are accurate, timely and constructive.</p> <p>Problems are identified.</p> <p>Issues are managed through to a satisfactory conclusion, or escalated if appropriate.</p>

	Risk to the Council / customers is minimised.
Contribute to identifying and delivering information / activities to support service delivery / promote the service area /.	Requirements are effectively identified.  All materials / activities are delivered to the required standards and timescales.  Information / activities achieve desired results.
Challenge customers' practice and minimise risk, referring concerns to line manager.	Customer risks are assessed.  Relevant health, safety and welfare requirements are met.
Work closely with others to clarify changing requirements. Identify, recommend and support the development and delivery of improvements. Contribute to the development and implementation of policies, procedures and systems.	Improvement opportunities and plans to achieve them are identified and recommended.  Agreed improvements are developed, delivered and evaluated.  Changes are effectively communicated to others.
Lead projects or improvement programmes, or contribute to the delivery of larger projects	Practical, effective solutions are developed and delivered in accordance with legislative requirements and good practice guidelines and address any relevant environmental / conservation / technical / design issues.  Projects are delivered to agreed specification, timescales and budgets.  All project documentation and reports are completed correctly.
Support others in their development, including external organisations / customers where appropriate.	Identify any changes that may impact the service / profession.  Contribute to the development of others (e.g. through sharing knowledge and skills, acting as a coach or mentor, or providing feedback).
Develop good working relationships and communicate effectively with internal / external organisations / partners and stakeholders. Represent specialist area internally and / or externally. Model, demonstrate and promote good practice relevant to the	Relevant work area reputation is maintained or enhanced.  Stakeholders are engaged with activity relevant to them.  Positive feedback is received from stakeholders.

role.	<p>Communications are clear, well planned and effective.</p> <p>Best practice is shared and promoted.</p>
Support partnership agreements and partnership working within area of responsibility.	<p>Activities which support partnership working are effectively delivered.</p> <p>Partnership working groups produce valid and timely outputs.</p>
<p>Contribute to service / business plans for area of responsibility and to wider service planning and development activities.</p> <p>Contribute to budget planning as required.</p>	Service / business plans reflect input.
Quality check documents, decisions and / or presentations before delivery	All work meets the required standards
Act in accordance with all policies and procedures which apply to the job and understand the reasons for this.	All policies and procedures are complied with.
<b>Job Specific Accountabilities:</b>	
To assist Principal Accountant and Finance Business Partner with financial and performance data.	<ul style="list-style-type: none"> <li>• Providing independent analysis and interpretation of financial and performance data, to allow decisions to be made following consideration of financial resource and control implications.</li> </ul>
To assist Principal Accountant, Finance Business Partner and Heads of Service in managing budgets	<ul style="list-style-type: none"> <li>• Assisting in financial modelling</li> <li>• Preparing financial reports and the budget book.</li> <li>• Provide appendices for Schools Forum reports and the School budget book.</li> <li>• Communicating budget allocations to managers</li> <li>• Setting budgets with managers and check for accuracy. Flagging and resolving any issues.</li> <li>• Providing budget monitoring information and other financial performance information as required</li> </ul>
Co-ordinating revenue and capital budget monitoring and balance sheet reconciliations	<ul style="list-style-type: none"> <li>• Collecting and analysing data</li> <li>• Identifying errors and advising managers</li> <li>• Assisting in reporting financial performance.</li> </ul>
Grant Management and submission of statutory returns	<ul style="list-style-type: none"> <li>• Ensuring compliance with financial regulations, operational guidance and grant conditions</li> </ul>
Perform procedures necessary to closure of accounts	<ul style="list-style-type: none"> <li>• Preparing and providing documentation to external auditors</li> <li>• Raise accruals</li> <li>• Reconcile ledger accounts</li> </ul>
To provide financial information	<ul style="list-style-type: none"> <li>• Responding to requests for information from senior officers within the Council and internal &amp; external</li> </ul>

	auditors where appropriate
Represent the Council etc.	<ul style="list-style-type: none"> <li>• Representing the Team, Directorate and Council at meetings as directed</li> </ul>
To give financial advice, support and assist in providing financial training to managers on systems and procedures, to improve service delivery and standards of financial management	<ul style="list-style-type: none"> <li>• Keeping up to date with financial procedures and their implications</li> <li>• Ensuring compliance in area of responsibility</li> </ul>
To assist managers with their financial responsibilities of the Councils Finances	<ul style="list-style-type: none"> <li>• Co-ordinating the monitoring and reporting of financial performance against capital and revenue budgets, providing options to managers to assist them achieve a spend to budget position at the end of the financial year</li> <li>• Providing robust support to ensure managers achieve their in year savings targets with minimum impact on service delivery</li> </ul>

### **Nature of Contacts**

Typically involves Heads of Service and Senior Managers across the authority, and external agencies and organisations providing advice.

Work directly with colleagues internal and external, other providers and external agencies to gather and exchange information and co-ordinate actions.

Develop sensitivity, persuasiveness, and negotiation and assertiveness skills to communicate with diverse audiences in emotive circumstances. Deal with people at all levels confidently, sensitively and diplomatically.

Provide specialist advice, guidance and support on issues within area of responsibility; develop and maintain joint working and promote the Council position.

Consult with stakeholders to identify requirements. Communicate changes in policy and working practice to contacts.

### **Procedural Context**

Work within a policy framework and regulatory guidelines, applying knowledge of systems, procedures and best practice. Work to broad managerial direction, within a policy framework and regulatory guidelines, to ensure performance standards are met within a framework of policy and legislation.

Plans own time and co-ordinates the work of others. Plan, organise and deliver interventions and actions. Responsible for professional advice, assessments or referrals.

Exercise professional judgement in assessing stakeholder requirements, potential risk and quality assurance of service. Monitor and evaluate performance / service delivery, ensuring all parties are informed of progress / issues as required.

Provide support to customers, colleagues and other stakeholders through applying knowledge of systems, procedures and best practice.

Responsible for meeting performance standards within a policy framework and regulatory guidelines. Accountable for proper use and security of information, resources, equipment and/or facilities within area of responsibility.

Use initiative to deal with complex issues and respond appropriately in an unpredictable work environment. May involve isolated working outside core hours.

Reports to: Finance Business Partner

### **Key Facts and Figures**

Enhanced DBS disclosure will be required.  
Flexible working at times outside standard office hours.

### **Resourcing**

Budget Responsibilities: Education budgets, including SEND and Early Years:  
Supervisory Responsibilities: Senior Finance Officer, SO2, and needs to co-ordinate the work of others

### **Knowledge, Skills and Experience**

- Ability to demonstrate sufficient knowledge and experience of Education, SEND Early Years services to provide the level of support required in this position, including knowledge of current legislation and legislative proposals, the challenges affecting the service area and the strategies being applied to address them.
- Experience of assisting a group of budget holders to understand and manage their budgets and prepare robust forecasts of outturn expenditure for the year in a large public sector organisation.
- Experience of analysing performance data for schools with a view to highlighting potential areas of budget scrutiny.
- Experience of producing annual accounts in accordance with relevant standards and timetables, supported by comprehensive working papers.
- Experience of liaising with external bodies (for example, external auditors and other Local Authorities)
- Experience of managing projects/financial issues.
- Experience of implementing sound and prompt solutions in the event of real, or potential, reconciliation difficulties in key systems.
- Ability to assist in the preparation of models showing the financial consequences of the Budget Strategy.
- Ability to encourage effective budgetary control and to assist in the identification of corrective strategies to contain expenditure within Budget.
- Ability to assist to monitor progress against timetables and to implement corrective strategies in the event of slippage or potential problems.
- Ability to assist in identifying potential changes to systems or processes to improve

the timeliness and robustness of the reconciliation process.

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- Self-motivated, and able to demonstrate initiative and commitment.
- Experience of working with partners.
- IT skills, including Microsoft Office suite, and skilled in the use of a computerised general ledger system, including experience of developing systems to achieve desired business outcomes.
- Experience of Oracle Cloud.

### **Indicative Qualifications**

Part-qualified Accountant (CCAB recognised) or fully qualified AAT or significant experience of working in a Public Sector finance environment.

GCSE (or equivalent) English Language and Maths grade A-C.

Excellent ICT skills , including high proficiency in Excel and Word

Excellent standards of written and verbal English

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