

Job Description

Job Title	SEND Financial Analyst
Directorate	Finance and Resources
Service Area	Financial Management
Grade	8
Competency Level	2
Salary	£46,142- £51,356
Job Type	Hybrid
Location	Cunard Building
Disclosure and barring service (DBS)	Not Required
Job Evaluation Ref No	A10500

Job Purpose

The main purpose of the post is to lead on the analysis and reporting of SEND finance and performance data. This role is essential to ensuring robust financial oversight and data integrity and analysis of SEND data such as Education, Health and Care Plan (EHCP) and stakeholder information of the send reform plan.

To work with SEN data, produce financial modelling and be involved in the SEND finance transformation.

Provide appropriate statutory financial reporting and completion of quarterly returns to the Department for Education (DfE) on the SEND reform plan.

Directly Responsible For:

N/A

Directly Responsible To:

Group Finance Manager – Education and Early Help

Main Areas of Responsibility:

- Be responsible to the Group Finance Manager for assisting in the financial oversight of the SEND reform plan
- Evaluates financial and SEND data, builds financial and forecasting models, and creates actionable reports
- Responsibilities typically include completion of quarterly returns to the Department for Education (DfE) on the SEND reform plan with variance analysis, budgeting, and collaborating with the SEND team
- Review of the current funding mechanism for the schools in Liverpool, with the focus of financial sustainability based on the needs of children attending the school
- Working closely and collaborating with commissioning, SEND, Data colleagues and Schools to produce a financial landscape for SEND
- Review value-for-money principles, financial efficiencies and savings modelling of the SEND reform and analyse and report financial impact and reform interventions and provide financial mitigations update
- Prepare detailed reports for senior managers, including budget forecasts and performance analysis

- Work with schools to analyse their SEND cohort funding and expenditure
- Be an effective member of the Finance Team, participate in other working parties / groups as appropriate and deputise for the Group Finance Manager as necessary
- Undertake any other duties that are commensurate with the grade of the post

Supervision and Management Responsibility:

- N/A

Budget and Financial Responsibility:

- Being fully accountable for managing the council's resources well and complying with statutory requirements. This includes managing time, avoiding unnecessary waste, reuse and recycle resources to reduce personal impact

Social Value Responsibility:

- Drive for social value through all activities, ensuring wider social, economic and environmental benefits for the council, residents and communities

Physical Demands of the Job:

- The job would include using a computer and sitting at a desk for prolonged periods of time, visiting schools if necessary

Corporate Responsibility:

- Contribute to the delivery of the Council Plan
- Delivering and promoting excellent customer service, externally and internally



- Commitment to customer excellence by dealing with customer feedback, including complaints, and learning from feedback in the drive for continuous improvement
- Making the council a great place to work, living the council's values, actively engaging in regular communications including team meetings, undertaking training as required and being responsible for managing own performance
- Develop the City Council's commitment to equal opportunities and to promote non-discriminatory practices in all aspects of work undertaken
- To ensure that all work functions are undertaken in accordance with health and safety legislation, codes of practice and the City Council's safety plan

Competency Framework:

We operate a competency framework, a set of core behaviours which define how we are expected to approach our work, how we perform in certain situations and how we treat each other. Each competency details the standards of behaviours and skills required by all staff and this in turn supports delivery of our aim and our council plans linking them together with our values.

The post holder will be required to demonstrate the ability to perform at the following competency level **2**.

[The competency framework can be found here.](#)

This job description is not intended to be either prescriptive or exhaustive. It is issued as a framework to outline the main areas of responsibility. You will be expected to carry out any other duties that may reasonably be required in line with your main duties and changing priorities of the organisation.

Person Specification

Assessment methods used: I = Interview, P = Presentation, A = Application, E = Exercise, T = Test, AC = Assessment Centre

Qualification and training

Essential

- Qualified Accountant CCAB (preferably CIPFA) (A)

Experience

Essential

- Knowledge of financial software packages, enquiry packages and corporate accounting systems (A,I)
- Experience in preparing budgets and compiling statistical reports to support decision-making (A,I)
- Proven experience in carrying out financial and data analysis and cost comparison, ideally within a local authority or education setting (A,I)
- Experience of working accurately with procedures and deadlines in a financial environment and providing advice on those procedures (A,I)
- Experience of providing financial information and advice to budget holders/non finance managers (A,I)

Desirable

- Experience of providing budgetary control and unit cost information
- Experience of working in Local government (in particular education or schools finance)

Skills/Abilities

Essential

- Excellent communication skills, both orally and in writing, particularly the ability to communicate complex financial issues to managers with a non-finance background and a range of audiences (A,I)
- Strong IT skills, including proficiency in spreadsheets, databases, and reporting tools (e.g. SQL, Power BI, Business Objects) (A,I)
- A proactive, organised approach with the ability to manage competing priorities and meet statutory deadlines (A,I)

Desirable

- Ability to manage change
- Ability to work in a multi-disciplinary team environment representing the finance function and with minimum levels of supervision
- Ability to manage own and other workload
- Ability to work under pressure
- Knowledge of SEND processes and funding mechanisms is desirable

Commitment

Desirable

- An understanding of and a personal commitment to the Vision and Values of Liverpool City Council

Other

Essential

- Occasional working outside normal hours and attendance at evening meetings (A, I)

