

# Job Description and Person Specification

SCHOOLS FINANCE SUPPORT  
MANAGER

A Lambeth to be proud of



**Job Title:** Schools Finance Support Manager  
**Department:** Financial Planning and Management  
**Division:** Finance and Resources  
**Grade:** P06  
**Reports to:** Group Manager – Schools and Education  
**Responsible for:** Up to 5 staff

### Context

- To support Lambeth schools and Education service in the delivery of sound financial advice on all matters within schools financial management and those which cut across the directorate. Ensure robust financial management frameworks are maintained and strategies are developed to help enable schools to deliver exceptional outcomes within resource constraints.
- To co-ordinate and develop the financial framework applying to schools, monitoring schools' financial performance and providing or procuring financial support and challenge to ensure school financial reporting standards are high and financial difficulties are overcome. To co-ordinate schools bursarial support service and charging mechanism to schools and produce annual review of income to align with support staffing cost recoupment.
- To work collaboratively with School Business Managers, senior leaders in schools and governors, as well as with managers within Finance and in the service (up to and including Director level), providing technical financial advice and support using professional knowledge and skills pro-actively to identify, investigate, analyse and evaluate issues/options.
- To lead/support and take ownership for the sound financial planning, management, closure of schools accounts, project support & advice, management accounting, reporting, statutory/statistical returns (including returns to government departments and tax returns) for relevant areas, and coordination of financial arrangements for a given division/area across both revenue and capital (as appropriate). To lead/support schools governance ensuring budget accountability is followed adhering to scheme of financing for schools, whilst supporting and advising schools senior management.
- To take ownership and proactive responsibility for the development of financial competence of schools leadership teams and ensuring compliance to the financial regulations of schools delegated budgets are followed, as well as compliance in using the financial systems of the schools and organisation. Whilst also ensuring schools develop robust financial recovery plans so as to either prevent deficits from occurring or where a school is already in deficit, ensure the recovery plan brings them back to a balanced position within a reasonable timeframe.

- To drive and implement the changing role of financial support in Lambeth schools in becoming a service that is proactive, takes ownership and maximises benefit from technological changes, focuses on becoming a data led, value adding professional advisory and support function whilst also ensuring appropriate controls are in place in relation to transitional processing.

## Job Purpose

1. Establish and maintain effective, responsive, and proactive advisory relationships with schools and education stakeholders, providing high-quality financial support that enables them to achieve their outcomes. Take ownership of issues through to resolution, working collaboratively across council services to drive financial improvement and deliver a strong customer-focused service.
2. Engage proactively with senior leaders, council officers, and elected Members, providing professional financial advice, analysis, and reports to support robust financial planning, management, and decision-making in line with the council's statutory responsibilities under Section 151 of the Local Government Act 1972.
3. Lead on the provision of expert financial support across the schools funding portfolio, including financial planning, budget setting, monitoring, year-end processes, and accounts closure. Ensure all outputs meet high professional standards and are suitable for internal and external scrutiny, liaising with auditors as required.
4. Provide strategic oversight and advisory support on budget monitoring and reporting for schools funding, ensuring compliance with Department for Education (DfE) and Education and Skills Funding Agency (ESFA) requirements. Support the accurate consolidation of school accounts and management of maintained school balances in line with statutory guidance.
5. Prepare, review, and coordinate the submission of grant applications, claims, and statutory financial and data returns to government departments and relevant bodies, ensuring accuracy, timeliness, and compliance.
6. Ensure financial transactions and accounting treatment within the Schools Accounts accurately reflect the council's financial position, promoting strong financial control and integrity at source.
7. Lead on the development, review, and communication of schools finance policies in line with DfE and ESFA requirements, ensuring schools are supported to operate within a robust financial governance framework. Provide oversight and guidance on key areas including cash management, banking, VAT, and deficit management.
8. Drive the continuous improvement of financial systems, controls, and processes, ensuring they effectively capture and analyse financial information and remain compliant with statutory and local requirements. Promote the use of technology and data to enhance financial insight and value-added advisory support.
9. Build financial capability across schools and stakeholders by encouraging ownership of budgets, supporting effective use of financial systems, and embedding strong forecasting and financial management practices.
10. Deliver training, guidance, and support to promote understanding of financial processes, controls, and governance requirements. Foster a culture of compliance and ensure stakeholders are aware of the implications of non-compliance.
11. Provide proactive financial advice and challenge on revenue and capital initiatives, including robust option appraisal, working collaboratively with services to support successful delivery and improved outcomes.

12. Develop and maintain strong professional networks within the council and across local and national education finance communities to support benchmarking, knowledge sharing, and continuous improvement. Represent the council's interests in relevant forums and partnerships.
13. Contribute to the development of financial strategy and policy within the education service and wider council, using analysis and insight to inform decision-making and support sustainable outcomes.
14. Maintain up-to-date specialist knowledge of financial legislation, accounting standards, and education funding policy, ensuring that changes are effectively interpreted, communicated, and embedded into practice to maintain compliance.

## Responsibilities

All Council managers are expected to work in a way which meets the Council's Core Values and Behaviours and supports the achievements of the Borough Plan outcomes.

Schools Finance Support Manager should:

- Develop effective, proactive and valued business support relationships with relevant Heads of Service/Assistant Directors that assists the directorates/divisions/areas in achieving their outcomes whilst driving financial improvements. This includes taking ownership to see the outcome delivered and working collaboratively with other colleagues/services to do this, where necessary.
- Actively contribute to becoming a pro-active team of finance staff that take ownership, personal responsibility, accountability and work in a collaborative manner to deliver a value adding, customer focused finance function, ensure outcomes are delivered which is positively recognised by service colleagues and others involved.
- Focus on effective management principles identifying ways to increase service efficiency by early intervention, service innovation, the involvement of stakeholders
- Champion efficiency, a performance culture, championing efficiency and value for money in relevant areas.
- Work with colleagues, partners providing specialist advice, information, resources, and ideas to support the development of effective delivery services for the benefit of service users and the community.
- Actively encourage and promote a culture of transparency and employee/stakeholder engagement, forming partnerships and developing effective working relationships with partners and service providers to support the successful delivery of services.

## Management Duties

- To foster a teamwork approach to all staff and encourage taking ownership, responsibility, pro-activeness, delivering excellent customer service, accountability, ensuring outcomes are delivered by working collaboratively with others and mutual understanding of the part each plays in the overall provision of service delivery.
- Make most day-to-day operational management decisions and to amend the work priorities of own service area in order to respond effectively to emerging issues and changing corporate priorities, referring only those with high impact or political sensitivity
- Support recruitment processes including the probationary period, setting of objectives and work plans, performance monitoring and management including appraisals and staff development including training needs analysis for teams across a range of different activities and technical specialisms in accordance with council policies and liP standards.
- To take personal responsibility for the good use of the council's resources appropriate to the job level and work area.
- To support the delivery of timely responses to queries from Councillors, Media and other stakeholders in accordance with council procedures.
- Support processes to ensure operational plans are in place to maintain business continuity, information security and risk management of activities within their remit.

### Generic Responsibilities

- Deputise for the Group Manager, as required
- Support managing and improving the functionality of financial systems, frameworks and processes, for given areas, to ensure data integrity, maintain financial control and allow the effective capture and analysis of financial information to meet user needs.
- Support processes to ensure that financial systems and processes across the council operate in compliance with financial policy and statute and any necessary amendments are designed and implemented promptly in response to framework changes or to any identified exceptions to governance and control standards.
- Co-ordinate/support responses to queries on financial matters in accordance with council procedures
- To work with external financial advisers and contractors (including be part of selection and appointment processes in accordance with procurement regulation and managing

the contractual relationships to ensure expected performance or compliance) as appropriate to the role.

- To carry out the duties of the post in accordance with the Data Protection Act, the Computer Misuse Act, the Health and Safety at Work Act, and other relevant legislation, as well as Council policies, procedures, standing orders and financial regulations.
- To carry out the duties of the post with due regard to the Council's Equal Opportunities Policy, taking responsibility, appropriate to the post, for tackling racism and all other oppressive and discriminatory practices, for promoting a positive recognition of differences and community cohesion and must at all times carry out their duties with due regard to the Council's policies on equalities and the staff code of conduct.
- To actively promote and uphold the Council's code of conduct, values, behaviours, priorities and service standards.
- To undertake other duties commensurate with this role and level of responsibility.

## PERSON SPECIFICATION

<p>It is essential that in you can meet the following requirements for the role and be able to give evidence or examples of your proven experience in each of the short-listing criteria marked Application (A).</p> <p>You should expect that all areas listed below will be assessed as part of the interview and assessment process should you be shortlisted.</p> <p>If you are applying under the Disability Confident scheme, you will need to give evidence or examples of your proven experience in the areas marked with “Ticks” (✓) on the person specification when you complete the application form.</p>			<b>Shortlisting Criteria</b>
<p><b><i>For link/career graded post, please mark knowledge, experience, and behaviours clearly for each grade.</i></b></p>			
<b>Key Knowledge</b>	K1	Detailed understanding of local government finance, funding, and financial techniques such as budgeting, monitoring, closure of account and options appraisal, specifically for Schools Accounting	✓A
	K2	Knowledge of the current financial challenges and issues being faced by local government in the Education sector.	✓A
	K3	Ability to understand and interpret complex legislative and regulatory frameworks that apply to local government, including proven knowledge of schools financial processes and delivery of Dedicated Schools Grants in line with National Funding Formula	✓A
	K4	Understanding of the requirements of accounting standards, Scheme for Financing Schools, ICFP and DfE reporting requirements	✓A
	K5	Ability to interpret financial data/information, apply logic and judgement	✓A
<b>Relevant Experience</b>	E1	Experience in working at a senior appropriate level within a School or Education setting delivering budget setting, monitoring and financial processes	✓A
	E2	Experience of providing financial advice (and writing reports) to senior officers on a wide range of subjects and the Dedicated Schools Grant and other school grants	✓A
	E3	Working with extremely large and complex budgets, financial systems and accounts	✓A
	E4	Proven track record of financial control and advice in local government finance or similarly regulated environment.	✓A
<b>Qualification</b>	Q1	There is an expectation that the postholder will be CCAB qualified or hold an appropriate qualification in Schools finance or have significant work experience or be working towards a relevant qualification	✓A

## CORE VALUES AND BEHAVIOURS



- Listen to the views of others and ask for their opinions making sure that everyone in my team inputs into the things that matter.
- Ensure fairness and justice is at the heart of my decision making and support to my team and others.
- Take time to build trust, building the respect of our stakeholders and ensuring as a team we take accountability for doing what we agree to do.
- Develop others and ensure we work as one team for Lambeth, encouraging everyone to play their part.
- Take positive action to ensure everyone in my team has opportunities to learn and grow at work.
- Encourage everyone to be themselves at work and value who they are.
- I am inclusive and actively celebrate diversity, recognising everyone in my team as individuals.

- Treat each member of my team with respect and dignity just as I would want for myself.
- Encourage each member of my team to do their very best work and am available to them to provide support and guidance.
- Personalise my support to each team members and look out for them, lending a hand wherever I can
- Encourage everyone to try and learn from mistakes and use integrity to take action with my team to put things right together
- Work with empathy seeking to understand each and every member of team, their unique perspective and circumstances and ensure everyone is heard
- Take the time to communicate, being honest, open and genuine and taking the time to get to know team members as individuals.
- Show compassion and patience recognising that everyone in the team has unique experience and celebrating the great work they do for Lambeth.
- Look after the health and wellbeing of my team members and encourage open and regular discussions about the issues that impact on them, working together to find solutions.



- I encourage and support my team to do the right thing even when it's tough and we communicate our decisions in a timely way.
- I ensure my team and employees take individual and collective accountability for performance and delivery, making sure that they have clear plans and performance objectives.
- I ensure my team plan ahead, getting the basics right and take swift action when problems arise.
- I encourage my team to be risk aware and ensuring that our decisions and actions are informed and understood and communicated to others.
- I provide regular, timely and constructive feedback to my team members on their performance and behaviours and act quickly when performance is not on track.
- I share my learning, knowledge and skills with others through coaching and mentoring and encourage others to do the same.
- I ensure that my team and I put residents, communities, customers and their needs at the centre of everything we do.
- I encourage my team to learn and grow and ask questions to find the information they need to do their jobs.

# Accountability behaviours



One Lambeth  
CONNECTED BY PURPOSE

# Ambition behaviours



One Lambeth  
CONNECTED BY PURPOSE

- Am proud of our borough and my team and encourage everyone in the team to aim for the highest possible standards of excellence in everything we do.
- Encourage my team to be flexible and try new things when it's appropriate to do so and tell me what could be improved.
- Promote a one team for Lambeth approach reaching out to our stakeholders to face our challenges together.
- Encourage and support my team to be courageous for our residents and communities and stop at nothing to ensure they have the best possible outcomes.
- I make time for the team to Innovate and look for creative ways to do things better, being curious about possibilities.
- Positively challenge and encourage the team to collaborate and look for solutions together across service and team boundaries.
- Make time for my team to grow and develop taking advantage of opportunities to learn from each other and others. We plan our learning and career growth.