

Role Profile

Part A - Grade & Structure Information

Job Family Code	8BF	Role Title	SEND payments and efficiency officer
Grade	PS8	Reports to (role title)	SEND Operations Service Manager
		Directorate/School	CFL
JE Band	269-313	Service/Department	ELL
		Date Role Profile was created	12.10.21

Part B - Job Family Description

The below profile describes the general nature of work performed at this level as set out in the job family. It is not intended to be a detailed list of all duties and responsibilities which may be required. The role will be further defined by annual objectives, which will be developed with the role holder. The Council reserves the right to review and amend the job families on a regular basis.

<p>Role Purpose including key outputs</p>	<p>This role supports effective financial management within the SEND service by providing accurate financial information, data analysis, and reporting to inform operational and service-level decision-making. The postholder works collaboratively with finance colleagues and SEND teams to help ensure financial information is reliable, timely, and aligned with agreed processes and requirements.</p> <p>The role contributes to financial accountability within SEND by supporting managers to understand spend, particularly in relation to high-cost placements and Education, Health and Care Plans (EHCPs). It plays a key part in maintaining clear financial data, highlighting variances or issues, and supporting constructive working relationships between SEND and finance colleagues.</p> <p>Key Outputs and Responsibilities</p> <ul style="list-style-type: none"> * Prepare and maintain accurate financial data and routine reports relating to SEND expenditure, including high-cost placements and funding decisions, to support managers and service leads. * Ensure SEND financial data is kept up to date and presented in agreed formats to meet the requirements of the SEND service and ELL. * Work with Corporate Finance, Business Support Finance, SEND teams, and Placement Stability colleagues to support the accuracy of placement cost data and resolve discrepancies. * Support the collection and maintenance of data relating to cost containment, avoidance, and correction activity within the SEND service. * Maintain and monitor financial information relating to education, health, and social care costs within EHCPs, supporting reconciliation, recoupment, and appropriate challenge in line with agreed procedures. Contribute SEND-specific financial information to relevant meetings and discussions, supporting colleagues by providing analysis, clarification, and follow-up actions as required. * Escalate data quality issues, risks, or inconsistencies to appropriate colleagues in line with agreed governance and reporting arrangements.
<p>Work Context</p>	<p>The postholder works within the SEND service and contributes to effective financial management by supporting the production and maintenance of accurate financial information aligned to service activity. The role operates within agreed financial frameworks, systems, and processes to support managers in monitoring expenditure and managing budgets.</p> <p>The postholder works with colleagues across SEND and finance functions to provide clear financial information and guidance, supporting consistent and transparent financial practice. The role supports managers to balance financial considerations with service delivery requirements.</p> <p>The role requires effective working relationships and clear communication to support shared understanding of responsibilities and consistent approaches to financial management within the service.</p>
<p>Line management responsibility if applicable</p>	None.
<p>Budget responsibility if applicable</p>	Indirect influence over budgets within a quadrant area.

<p>Representative Accountabilities Typical accountabilities in roles at this level in this job family</p>	<p>Analysis, Reporting & Documentation</p> <ul style="list-style-type: none"> • Prepare and analyse management information, including financial reports / project plans, recommending actions as appropriate. • Maintain, develop and review business support systems, processes and procedures to secure a quality, cost effective service and continuous improvement. <p>Service Delivery</p> <ul style="list-style-type: none"> • Deliver a range of specialist services advising and assisting customers in area of expertise, to maximise service quality, efficiency and continuity. • Maintains knowledge of the organisation's current systems, policies and procedures. • Resolve issues/queries independently, recommend alternative solutions if unable to assist, and ensure efficient, day-to-day customer service is delivered. <p>Planning & Organising</p> <ul style="list-style-type: none"> • Monitor service objectives and standards within own area of work to ensure effective service delivery. • Plan and prioritise own work activities for the months ahead, to ensure operational efficiency. Respond effectively to changing demands, adjusting priorities as needed. <p>Finance/Resource Management</p> <ul style="list-style-type: none"> • Assist budget/resource management in accordance with the organisation's policies and procedures. • Maintains, develops and reviews financial support systems, processes and procedures. <p>Work with others</p> <ul style="list-style-type: none"> • Liaise, communicate and build relationships with other internal departments, customers, partner organisations, agencies and/or contractors to support and represent the team/service. • Undertake and coordinate projects and reviews in a defined area of activity to support and enhance service delivery. <p>People Management</p> <p>Either:</p> <ul style="list-style-type: none"> • Manage staff, allocating and prioritising their work and manage performance to secure efficient service delivery. • Oversee the work of others as the most experienced team member. <p>And/Or:</p> <ul style="list-style-type: none"> • Operate as an individual maintaining and improving operational efficiency and quality of service of own area. • May be recognised as the main point of contact for a particular specialised process, system or procedure or for a senior member of staff. <p>Duties for all</p> <p>Values: To uphold the values and behaviours of the organisation.</p> <p>Equality & Diversity: To work inclusively, with a diverse range of stakeholders and promote equality of opportunity.</p> <p>Health, Safety & Welfare: To work alongside colleagues in the maintenance of a safe working environment reporting incidents, accidents, repairs and maintenance promptly and taking appropriate action as required. Adherence to safe working under the health and safety policy is required.</p> <p>To have regard to and comply with safeguarding policy and procedure as appropriate.</p>
<p>Education, Knowledge, Skills & Abilities, Experience and Personal Characteristics</p>	<ul style="list-style-type: none"> • Educated to 'A' level standard, or able to evidence ability at an equivalent level. • Professional business qualification to NVQ Level 4, or able to evidence knowledge and understanding of appropriate business disciplines; willingness to study for a relevant professional qualification if appropriate. • For some roles a relevant degree may be required. • Excellent IT skills. • Excellent written and oral communication skills with the ability to build sound relationships with customers, adapting styles to different situations. • High level administrative/organisational and analytical skills. • Ability to manage a range of projects through to completion. • Effective interpersonal, influencing and negotiation skills. • Practical experience and understanding of business supporting service teams and/or providing support to the public (where appropriate). • Experience of leading a team (where appropriate).

Details of the specific qualifications and/or experience if required for the role in line with the above description	<p>Educated to A-Level Standard as minimum</p> <p>Experience</p> <p>Experience of working with financial data to support budget monitoring or reporting. Experience of working with colleagues across services, including finance teams. Experience of contributing information to support managers' understanding of expenditure.</p> <p>Skills and Knowledge</p> <p>Ability to interpret and present financial information clearly to non-financial colleagues. Working knowledge of financial systems and spreadsheets, with attention to accuracy. Clear communication skills and ability to work collaboratively within agreed processes. Understanding of financial accountability and budget management in a service environment. Experience or willingness to learn about SEND</p>
Role Summary	<p>Roles at this level may manage a straightforward operational activity or small team, provide specialist support services or they may be in the second year of a professional career development role. They have in-depth knowledge of methods, systems and procedures and possess practical understanding in one or more disciplines, for example finance, HR, communications, facilities, procurement. They are often process 'experts' seeking to deliver maximum efficiency within a defined process. A thorough knowledge of their own area or discipline is required although overall supervision from a more experienced professional is in place. They work collaboratively with customers, staff, partner organisations, agencies and/or contractors and play a major role in maintaining quality standards and/or engaging in project management.</p>

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