

Job Title	Range	Duties	Level A (Developing)	Level B (Practising)	Level C (Accomplished)
Finance Officer	Range 3	Maintain up to date records of finance transactions.	Required for this level	In addition to level A	In addition to levels A and B
		Ensure activity, performance and savings data is regularly updated and reconciled.	Qualifications Good level of education with grade 4 or above at GCSE or equivalent in Maths and English.	Qualifications	Qualifications
		Identify and investigate anomalies in data.			
		Prepare budget reports when required.	Knowledge - Good working knowledge of Microsoft applications. - Basic knowledge and understanding of finance processes. - An awareness of GDPR and best practice in relation to information sharing	Knowledge - Intermediate knowledge of Excel spreadsheets and formulas. - Intermediate knowledge of Microsoft applications other than Excel. - A comprehensive working knowledge of the broad activities of the Education and SEND service - Working knowledge of how Integra and/or Synergy are used within the Finance teams processes and procedures.	Knowledge - Good working knowledge of finance systems and accounting processes. - A good understanding of GDPR and how this relates to the work of the team.
		Reconciliation and settlement of submitted invoices.			
		Assist with admin and delivery of other function within the wider division.	Experience - Experience in a finance or admin support role. - Experience of updating records accurately using electronic or hard copy filing systems/databases	Experience - Experience of ensuring data quality and accuracy. - Experience of processing invoices and payments. - Experience of providing comprehensive finance and admin support across the Education and SEND service. - Experience of confidently using Integra and Synergy	Experience - Experience of completing a range of complex tasks such as investigating anomalies in data and dealing with large, detailed calculations - Experience of providing general information, advice and guidance to the Education and SEND division on internal procedures relating to finance.
		To maintain and keep up to date the team email inbox.	Skills - Proficient in Microsoft Word, Excel, TEAMS and Outlook - Able to use spreadsheets and formulas to manage, monitor and ensure accuracy of large amounts of data.	Skills - Able to work independently, using initiative to problem solve effectively. - Able to check, reconcile and submit invoices up to £10,000.	Skills - Able to check, reconcile and submit invoices over £25,000 for payment with minimal support from line management. - Able to take active role in the preparation of budget forecasts. - Good interpersonal skills with a focus on internal stakeholder relationships

			• Able to show attention to detail and accuracy when following processes • Able to effectively manage multiple shared outlook mailboxes. • Able to manage time effectively, adhering to a range of deadlines. • Good written and oral communication skills	• Able to prepare and provide financial data to aid budget monitoring and budget reports.	• Able to identify anomalies in data, escalating where required.
Education Traded Services Senior Officer	Range 4	To maintain the Schools Service Level Agreement (SLA) Online Portal.	Required for this level	In addition to level A	In addition to levels A and B
		To be the lead in terms of Free School Meal eligibility for the division.	<u>Qualifications</u> • 5 GCSE's grade 4 and above, or equivalent, including English and Mathematics.	<u>Qualifications</u>	<u>Qualifications</u>
		Prepare and reconcile traded service charges, raise invoices and passport income.			
		Please see Job Profile for full details	<u>Knowledge</u> • A good working knowledge of IT and systems including spreadsheets, databases and statistical analysis packages. • Basic knowledge of online SLA systems and working with schools on Free School Meals eligibility. • Good understanding of GDPR and how this relates to the work of the team	<u>Knowledge</u> • Good knowledge of online SLA systems and working with schools on Free School Meals eligibility. • Developing knowledge of the local and national regulations, criteria and policies for Free School meals. • Knowledge of internal and external stakeholders including Medway and non-Medway schools that buy Medway services. • Working knowledge of the SLA Online (Schools portal)	<u>Knowledge</u> • Expert knowledge of the local and national regulations, criteria and policies for Free School meals. • Expert knowledge of online SLA systems and working with schools on Free School Meals eligibility.
			<u>Experience</u> • Experience of working successfully in a traded service or free school meals setting. • Experience of working with a range of internal and external stakeholders	<u>Experience</u> • Experience of maintaining the Schools SLA Online Portal • Experience of maintaining spreadsheets tracking free school meals payments • Experience of developing relationships with key stakeholders and senior decision makers within traded services	<u>Experience</u> • Experience of interpreting and applying complex policy, regulations or guidance in relation to FSM & Traded Services. • Experience of taking the lead in relation to Free School Meal eligibility for the division. • Experience of identifying and escalating any issues relating to the SLA Online Portal to the third-party provider.
			<u>Skills</u>	<u>Skills</u>	<u>Skills</u>

			- Proficient in the use of Microsoft Word, Excel and Outlook, including spreadsheets, databases and statistical analysis packages. - Able to update and maintain data maintaining a consistent level of attention to detail. - Able to prepare and raise traded services invoices - Able to set and meet tight deadlines and prioritise workloads. - Good communication skills with the ability to communicate with a range of stakeholders in person, via email and over the phone. - Able to simplify and explain complex data (both qualitative and quantitative) within correspondence.	- Excellent interpersonal skills and ability to present effectively to a range of stakeholders. - Able to prepare and reconcile traded service charges including passporting income to services with minimal support. - Able to use Integra, with the ability to resolve any issues around traded services invoices with minimal support.	- Able to identify areas for improvement within existing Traded Services and Free School Meals process and be able to implement changes. - Able to contribute to the development of policies and procedures in relation to School Traded Services and Free School Meals. - Able to independently prepare and reconcile traded service charges including passporting income to services - Able to confidently use Integra, resolving any issues around traded services invoices independently.
SEN Finance and Information Officer	Range 5	To be responsible for the day-to-day management and maintenance of specific SEN databases relating to SEN Pupils, Placements and Funding. To register and facilitate the payment of invoices/credit notes relating to the SEN department and its High Needs budgets including top up funding. Please see Job Profile for full details	Required for this level	In addition to level A	In addition to levels A and B
			<u>Qualifications</u> 5 grade 4 and above at GCSE, or equivalent, including English and Mathematics.	<u>Qualifications</u>	<u>Qualifications</u>
			<u>Knowledge</u> - A good working knowledge of general financial systems, budget monitoring processes and accounting practices. - Good knowledge of finance and accounting principles related to local government finance.	<u>Knowledge</u> - Developed knowledge of Medway's Finance policies, procedures and systems in relation to SEND. - Developed knowledge of finance and accounting principles related to local government finance.	<u>Knowledge</u> A good understanding of local government financial regulations.
			<u>Experience</u> - Experience of working within a finance role. - Experience of completing budget monitoring and ensuring effective spend of budgeted sums. - Intermediate level experience of IT systems including Excel, Word, PowerPoint, financial management systems.	<u>Experience</u> - Experience of completion and submission of central government statutory returns relating to SEND. - Advanced experience of IT systems including Excel, Word, PowerPoint, and service-based systems including Integra & Synergy. - Experience of working under own initiative with minimal input from management.	<u>Experience</u> - Experience in preparing, controlling, and updating reports in relation to SEND finance and funding. - Experience of contributing to change and new ideas in relation to SEND finance and funding processes and procedures.
			<u>Skills</u>	<u>Skills</u>	<u>Skills</u>

			• Able to analyse and interpret large amounts of varied and complex information. • Able to carry out accounting processes for considerable financial amounts accurately and with due care and attention. • Able to communicate effectively both orally and in writing to a wide range of stakeholders. • Able to manage and prioritise multiple workloads.	• Able to work independently within defined finance procedures making decisions without referring to line manager. • Able to deal with considerable levels of work-related pressure while meeting multiple deadlines. • Advanced communication skills that support presenting finance / budget information in an understandable way to a range of stakeholders. • Able to maintain a consistent level of attention to detail and accuracy in all workstreams. • Able to support R3 team members development, with training on processes and procedures	• Able to present complex information in relation to SEND finance and funding to a range of stakeholder's face to face at meetings. • Able to contribute to budget setting for SEND budgets. • Able to provide advice and guidance to budget managers ensuring effective spend of budgeted sums. • Interpret and give advice and guidance to budget managers and senior management within SEND on the operation and implementation of external regulations and statutory requirements in relation to SEND finance and funding.
Early Years Funding Officer	Range 5	To extract data and compile complex data reports to support the sufficiency assessment analysis and place planning and to complete all Government Financial returns and data reports to deadlines. To be responsible for planning all procedures and timeline processes through to allocation and distribution of payments to Private Voluntary and Independent nurseries. Please see Job Profile for full details	Required for this level	In addition to level A	In addition to levels A and B
			Qualifications • 5 grade 4 and above at GCSE, or equivalent, including English and Mathematics.	Qualifications	Qualifications
			Knowledge • A good working knowledge of financial systems, budget monitoring processes and accounting practices. • Basic knowledge of finance and accounting principles related to local government finance.	Knowledge • Good knowledge of Medway's Finance policies, procedures and systems. • Good knowledge of finance and accounting principles related to local government finance.	Knowledge • A good understanding of local government financial regulations. • Expert knowledge of finance and accounting principles related to local government finance.
			Experience • Experience of working within a finance role. • Experience of completing budget monitoring and ensuring effective spend of budgeted sums. • Intermediate level experience of IT systems including Excel, Word, PowerPoint, financial management systems.	Experience • Experience of completion and submission of central government statutory returns relating to Early Years. • Advanced experience of IT systems including Excel, Word, PowerPoint, and service-based systems including Integra & Synergy. • Experience of working under own initiative with minimal input from management.	Experience • Experience in preparing, controlling, and updating reports in relation to Early Years finance and funding. • Experience of contributing to change and new ideas in relation to Early Years finance and funding processes and procedures.

			<u>Skills</u> • Able to analyse and interpret large amounts of varied and complex information. • Able to carry out accounting processes for considerable financial amounts accurately and with due care and attention. • Able to communicate effectively both orally and in writing to a wide range of stakeholders. • Able to manage and prioritise multiple workloads.	<u>Skills</u> • Able to work independently within defined finance procedures making decisions without referring to line manager. • Able to deal with considerable levels of work-related pressure while meeting multiple deadlines. • Advanced communication skills that support presenting finance / budget information in an understandable way to a range of stakeholders. • Able to maintain a consistent level of attention to detail and accuracy in all workstreams. • Able to support R3 team members development, with training on processes and procedures	<u>Skills</u> • Able to present complex information in relation to Early Years finance and funding to a range of stakeholder's face to face at meetings. • Able to contribute to budget setting for Early Years budgets. • Able to provide advice and guidance to budget managers ensuring effective spend of budgeted sums. • Interpret and give advice and guidance to budget managers and senior management within Early Years on the operation and implementation of external regulations and statutory requirements in relation to Early Years finance and funding.
Finance and Admin Team Manager	Range 5	Manage the Education Finance Team to complete business and finance tasks for the wider school services department. Preparation of the monthly and quarterly monitoring returns (in consultation with budget managers) ensuring that these are recorded accurately and highlighting any risks to the service. Please see Job Profile for full details	Required for this level	In addition to level A	In addition to levels A and B
			<u>Qualifications</u> • 5 grade 4 and above at GCSE, or equivalent, including English and Mathematics.	<u>Qualifications</u>	<u>Qualifications</u>
			<u>Knowledge</u> • A good working knowledge of financial systems, budget monitoring processes and accounting practices. • Basic knowledge of finance and accounting principles related to local government finance.	<u>Knowledge</u> • Good knowledge of Medway's Finance policies, procedures and systems. • Good knowledge of finance and accounting principles related to local government finance.	<u>Knowledge</u> • A good understanding of local government financial regulations. • Expert knowledge of finance and accounting principles related to local government finance.

			<u>Experience</u> • Experience of working within a finance role. • Experience of completing budget monitoring and ensuring effective spend of budgeted sums. • Intermediate level experience of IT systems including Excel, Word, PowerPoint, financial management systems. • Experience of supervising others, assigning work and checking progress and output.	<u>Experience</u> • Experience of line managing others, setting targets and monitoring performance against those targets. • Advanced experience of IT systems including Excel, Word, PowerPoint, and service-based systems including Integra. • Experience of working under own initiative with minimal input from management.	<u>Experience</u> • Experience in preparing, controlling, and updating reports in relation to Education Finance. • Experience of contributing to change and new ideas in relation to Education finance and funding processes and procedures. • Experience of using HR policies and procedures to effectively support the management of staff.
			<u>Skills</u> • Able to analyse and interpret large amounts of varied and complex information. • Able to carry out accounting processes for considerable financial amounts accurately and with due care and attention. • Able to communicate effectively both orally and in writing to a wide range of stakeholders. • Able to manage and prioritise multiple workloads.	<u>Skills</u> • Able to work independently within defined Medway finance procedures making decisions without referring to line manager. • Able to deal with considerable levels of work-related pressure while meeting multiple deadlines. • Advanced communication skills that support presenting finance / budget information in an understandable way to a range of stakeholders. • Able to maintain a consistent level of attention to detail and accuracy in all workstreams.	<u>Skills</u> • Able to present complex information in relation to Education funding to a range of stakeholder's face to face at meetings. • Able to contribute to budget setting for Education budgets. • Able to provide advice and guidance to budget managers ensuring effective spend of budgeted sums. • Interpret and give advice and guidance to budget managers and senior management within Education on the operation and implementation of external regulations and statutory requirements in relation to Education finance and funding.

High Needs Business Manager	Range 6	Lead, develop and maintain an appropriately skilled and highly motivated team who are focused on achieving high standards in the delivery of the service. Lead on the provision of comprehensive and high-quality support, including budgetary control and financial management practices. Please see Job Profile for full details	Required for this level	In addition to level A	In addition to levels A and B
			Qualifications 5 grade 4 and above at GCSE, or equivalent, including English and Mathematics.	Qualifications	Qualifications Association of Accounting Technicians (AAT) or equivalent accounting qualification.
			Knowledge - Expert knowledge of general financial systems and budget monitoring processes. - Advanced knowledge of IT systems including Excel, Word, PowerPoint etc. - Good knowledge and understanding of the relevant national funding policies and legislation in relation to SEND & Early Years. - Expert knowledge of finance and accounting principles related to local government finance. - Good knowledge of GDPR and data sharing principles	Knowledge - Developed knowledge of Medway's Finance policies and procedures. - Expert working knowledge of Medway's financial systems (Integra), budget monitoring processes and accounting. - Expert knowledge of central government statutory returns relating to SEND & Early Years. - A working knowledge of Medway's maintained and acadamisised schools	Knowledge - Expert knowledge of Medway's policies and procedures in relation to SEND and Early Years. - Expert knowledge and understanding of the relevant national funding policies and legislation in relation to SEND & Early Years.
			Experience - Experience of working with SEND & Early Years funding and-finances. - Experience accounting for very large sums of money, ensuring accuracy and due care and attention. - Experience of supervision of staff including the provision of direction and guidance - Experience of overseeing data updates and information processes	Experience - Experience of using HR policies and procedures to effectively support the management of staff. - Experience of overseeing the specific systems and processes relating to SEND and Early Years Finance - Experience of starting to contribute to work on developing financial procedures within SEND and/or Early Years	Experience - Experience of taking a major role in developing financial policies and procedures within SEND and/or Early Years to meet the organisation's financial needs. - Experience in presenting complex financial information in an understandable way, to a range internal and external stakeholders.
			Skills - Advanced Excel skills, including creation and updating of spreadsheets and databases including use of complex formulas and functions. - Ability to deal with high levels of work-related pressure, for example from deadlines,	Skills - Able to develop efficient and robust procedures and processes to ensure tracking and payment of funding within the Early Years and SEND division, ensuring accuracy of data. - Developed interpersonal skills with a focus on management communication and development of staff.	Skills - Able to contribute to medium- and long-term financial planning for SEND & Early Years, through analysis and interpretation of financial/budget data. - Able to contribute to management and planning of SEND commissioned placements. Able to confidently lead on the day-to-day delivery of the work of the Early Years and SEND finance team.

			interruptions or conflicting demands. • Able to work independently within clear guidelines and regularly uses initiative to make decisions with minimal input from line manager. • Able to complete budget setting and monitoring for budgets. • Able to provide advice and guidance to management ensuring effective spend of budgeted sums. • Good interpersonal skills with the ability to adapt communication style where needed	• Able to lead on the completion and timely submission of all Data Returns to the Department for Education, Regional LA Groups and to the Council's Business and Performance Team.	• Able to deputise for the R7 to provide advice and guidance on the processes of the team, attending meetings where required.
Education & SEND Business Programme Lead	Range 7	To manage and lead, both strategically and operationally, the Business and Finance function across the Education and SEND Division and play a key role in developing and delivering efficient and effective processes and systems. Please see Job Profile for full details	Required for this level	In addition to level A	In addition to levels A and B
			Qualifications • 5 grade 4 and above at GCSE, or equivalent, including English and Mathematics. • AAT or equivalent relevant qualification.	Qualifications	Qualifications
			Knowledge • Expert knowledge of Local Authority ways of working and procedures in relation to Finance. • Developed knowledge of GDPR and data sharing principles • Good knowledge of team management strategies. • Good knowledge of statutory reporting duties in relation to local government finance. • Expert knowledge of general financial systems and budget monitoring processes.	Knowledge • Expert knowledge of Medway's policies and procedures in relation to Education and SEND. • A developed knowledge of Medway's maintained and acadamised schools • Expert knowledge of Medway's financial systems (Integra), budget monitoring processes and accounting.	Knowledge • Expert understanding of statutory reporting duties in relation to local government finance. • Expert knowledge of finance and accounting principles related to local government finance.
			Experience • Experience of working within a finance environment at a senior level • Experience of managing a team to deliver agreed outcomes. • Experience of working in a pressured environment to meet multiple deadlines.	Experience • Experience of using HR policies and procedures to effectively support the management of complex staff issues. • Experience of leading in developing financial policies and procedures within Education and SEND to meet the organisation's financial needs.	Experience • Experience in the identification and management of financial risk with minimal support from senior management • Experience of providing advice and guidance on complex internal policies and procedures related to Education and SEND Finance.

			• Experience of delivering finance related reports to a range of stakeholders. • Experience of using financial data to inform service delivery. • Experience of developing processes to enhance the output of a team	• Experience of internal and external stakeholder management • Experience in the identification and management of financial risk, with occasional support from senior management.	
			<u>Skills</u> • Able to work independently within clear guidelines and regularly use initiative to make decisions without the input from senior management. • Expert communication skills with the ability to present complex financial information in an understandable way to a range of audiences. • Able to provide advice and guidance on the financial impacts and risks around service changes. • Able to deal with high levels of work-related pressure, for example from deadlines, interruptions or competing demands. • Developed ICT skills, including use of financial management systems, Microsoft packages.	<u>Skills</u> • Able to lead on medium- and long-term financial planning for Education & SEND, through analysis and interpretation of financial/budget data. • Able to train other employees on Finance processes and systems. • Able to lead on effective quality assurance across processes to maintain accuracy and deadlines in relation to finance across Education & SEND. • Able to contribute to the Education & SEND Service Improvement Plan in relation to the finance function.	<u>Skills</u> • Proven ability to manage time pressured tasks, to ensure wellbeing of staff and service delivery. • Able to work effectively with Education & SEND Budget Managers and Senior Management to identify savings and financial efficiencies across the division. • Able to confidently present financial updates to Education Management Team (EMT) • Able to lead on the development of the finance element within the Education & SEND Service Improvement Plan