

# Job description

**Job title:** Sufficiency and Funding Manager

**Grade:** Grade 13

**Job evaluation reference:** HS524

**Job family:** Health & Social Care

## Purpose and impact

1. Strategic overview and understanding of income and expenditure within the Dedicated Schools Grant (DSG), in particular the High Needs Block (HNB) and how it impacts on schools and children.
2. Design and construction of formulae for high needs in all settings, to support all vulnerable groups to ensure the effective delivery of educational placements and support for children and young people with SEND.
3. Understand allocations and forecasts and advise Corporate Directors on implications and recommendations to ensure effective allocation of limited resources and financial compliance.
4. To improve outcomes and meet statutory obligations for SEND provision and work alongside the strategic commissioners for SEND leading the sufficiency duties surrounding the provision of SEND places and to link and work together with colleagues in Corporate Services regarding the Children's Services SEND policy and its impact on financial management and the budget.
5. Interpretation of legislation to ensure the appropriate use of DSG as it relates to high needs pupils including development and maintenance of the funding formulae for allocation of DSG to schools for SEND purposes, informed by the position on School Funding in Dorset.
6. Development of new high needs funding mechanisms to support the directorates SEND and Alternative Provision (AP) priorities.
7. Understand the relationship between high needs funding and other funding streams for educational institutions.
8. Contributing the Children's Services input to inter-departmental working groups and corporate management meetings, including taking the lead in some cases. Giving frequent advice and direction to the Executive Director, Corporate Directors and Heads of Service/Locality, and cost centre managers in order to ensure that corporate financial policies and strategies are applied in the best interests of the directorate.
9. Acting as financial adviser to certain Committees and Directorates of the Dorset Council, as assigned, including attendance at committee meetings as required, membership of the relevant Management Teams and liaison on a day-to-day basis with Directors, elected members of the Council and senior staff, in order to ensure that decisions take into account all relevant financial issues and information. Committee work includes introducing reports, making presentations, initiating debate, clarifying points and dealing with queries.
10. Participating as a member of the appropriate directorate management teams, in order to decide resource allocation matters. Identify and bring issues relating to efficiency and risk that arise in the post holder's area of responsibility to the attention of the Head



of Service for Health, Education and SEND or corporate colleagues as appropriate. Participate in the extended team's consideration of these issues on a corporate basis.

11. Undertaking and/or leading major financial project work carrying significant implications for the funding of the Dorset Council as instructed.
12. To support the efficient operation of the Schools Forum in line with current legislation in so far as it relates to schools and early years settings.
13. Engagement with national lobbying and influencing of DSG funding for Dorset pupils including with f40.

### Key responsibilities

14. Create modelling spreadsheets and manage the formulae for funding specialist provision in schools and academies.
15. Analyse the data available through the case management system or Power BI to understand future trends in the requirement for high needs funding.
16. Undertake a strategic role in securing the authorities duty for school and early years places.
17. Oversee the Safety Valve model and direct the work of the Accountant (Children's), Finance and Commercial through matrix management.
18. Analyse and advise on the formulation of directorate strategy and policy in response to changes in legislation and initiatives affecting school high needs funding, leading to the production of processes, systems and procedures and to support staff in their implementation.
19. Prepare and finalise proposals for the use of DSG, including allocation between specials schools, resourced provisions or other specialist provision for consultation with the Schools Forum as appropriate.
20. Decide and agree the number of high needs places to be commissioned annually and notified to the DfE.
21. Advise Members, Directors and other officers in the post holder's capacity as the Council's financial expert in the relevant area of activity.
22. Decide and agree the scope, programme and methodology adopted for major financial project work – subject to the relevant project management arrangements.
23. Prioritise the post holder's own work and that of team members.
24. Make recommendations to the Head of Service as necessary on the appointment of staff.
25. Ensure that funding policies can be taken forward with payment processes in collaboration with Finance and Commercial colleagues.
26. Ensure that systems are in place so that funding provisions can be applied to pupil records by locality SEND provision leads to enable Finance and Commercial colleagues to make timely payments to schools and academies.
27. Work closely with the Schools, Finance and Support team to ensure that decisions made by the postholder can be linked to the work undertaken by that team in monitoring and supporting schools' budgets.



28. Support the provision of monitoring information on high needs finances so that it is available to all levels of management in the directorate, to members and to the Schools Forum on an accurate, timely and understandable basis.
29. Ensure appropriate levels of training and advice is available to schools in undertaking the school management of high needs funding.
30. Have a strategic overview of the funding streams of services affecting the Schools Budget.
31. To develop a close working relationship with the locality teams especially the Learning and Belonging Service Managers, SEND Team Managers, and Education Challenge Leads in joint understanding of the impact of SEND on the management of funding in schools. Undertake training of locality staff as needed.
32. To represent the views of Dorset in the national funding arena in respect of School Finances.
33. Liaise with capital colleagues in the planning and implementation of high needs capital investment programmes. Align the revenue costs associated with the opening of new provision with the safety valve or other revenue funding models.
34. Assist in maximising the available funding for Dorset's Schools through the development of innovative approaches, investigation of partnership arrangements and accessing new funding streams.
35. Understanding and reviewing the impact of the DfE annual import/export adjustment process including correspondence with other local authorities and completion of the adjustment template for submission to the DfE.
36. Calculation of the financial impacts of pupil place planning on the capital programme and any changes to the capital programme including the SEND School Capacity Survey (SCAP).
37. Advise on any proposed changes to school provision including resourced provision hubs and other specialist settings.
38. Undertake training to Governors, Schools, and members of the Schools' Forum and others on High Needs Funding and how it fits into the DSG and local authority funding.
39. Any other lesser or comparable duties as required.

NB: The duties and responsibilities of this post are not restrictive, and the post holder may be required on occasion to undertake other duties. This will not substantially change the nature of the post.

### **Supervision and management**

Reporting to: Head of Service Health, Education and SEND Commissioning

Responsibility for: Oversee the Safety Valve model and direct the work of the Accountant (Children's), Finance and Commercial through matrix management.

### **Other factors**

40. Responsibility for a personal computer.



**Dorset**  
Council



41. Frequent input to interrogation of and use of the major financial and case management systems of the Council, and development of, ownership of budgeting and monitoring spreadsheets for relevant activities.
42. The post will be office/home working-based post with travel required periodically to attend meetings, locally and regionally.
43. Conflicting demands and deadlines are a regular feature of the post, including managing demands made by the changing requirements of members, officers and external organisations. The budgeting, monitoring and final accounts cycle imposes many strict deadlines, around which other work has frequently to be reprioritised.
44. The post will require the post holder to work occasionally in challenging situations where robust debate occurs.
45. An Enhanced DBS check is required.

### **Our values**

Our values act as guiding principles, defining what we believe is important in the ways we work together. Our values are Respect, Together, Accountability, Openness and Curiosity. You will need to be able to demonstrate these values in action through the way you work, regardless of your role within the organisation. Information about our values can be found on our website.



# Person specification

Your application will be assessed based on your demonstration of how you fulfil the following criteria; you should include clear examples of how you meet these criteria within your application form and during the assessment process.

## Essential

Essential criteria are the minimum requirement for the above post and will be assessed through a combination of your application form, assessment, interview and references (as specified below). We will require evidence of the qualifications, training or registrations listed below.

<b>Qualifications, training or registrations</b> Required by law or essential to the performance of the role or both	<b>Assessed through:</b>
1. A degree or equivalent professional qualification in financial, educational or business management	Application form
<b>Experience</b>	
2. Substantial experience with working through complex issues with a range of internal and external partners	Application form Interview Assessment
3. Significant experience in a similar or related financial environment	Application form Interview Assessment
4. Extensive experience in the use of ICT systems for data analysis and modelling of complex financial solutions	Application form Interview Assessment
5. Significant experience of providing sound financial advice to a wide range of interested parties	Application form Interview Assessment
6. Experience of working with non-financial staff to establish and monitor budgets	Application form Interview Assessment
7. Experience of staff supervision/management	Application form Interview Assessment
<b>Knowledge</b>	
8. Extensive knowledge of local authorities' duties to secure sufficient SEND places in schools	Application form Interview Assessment
9. Wide-ranging and detailed knowledge of government legislation and guidance on local government and other relevant areas and of performance management frameworks applicable to specified service area	Application form Interview Assessment
10. Detailed knowledge of computerised business applications, including accounting systems, spreadsheets, word processing, presentations and collaboration (Teams)	Application form Interview Assessment
11. Extensive knowledge of school finance regulations	Application form Interview Assessment
12. Detailed knowledge of appropriate Financial Reporting standards and reporting requirements	Application form Interview Assessment
13. Sound understanding of the principles of financial management	Application form Interview Assessment





<b>Skills and abilities</b>	
14. Excellent communication and presentation skills	Interview Assessment References
15. Excellent spreadsheet skills	Interview Assessment References
16. Excellent numeracy and literacy skills	Interview Assessment References
17. Ability to analyse large amounts of data from database systems	Interview Assessment References
18. Ability to communicate with non-financial staff and managers	Interview Assessment References
19. Excellent interpersonal skills	Interview Assessment References
20. Accuracy and ability to work with conflicting demands and timescales	Interview Assessment References
21. Ability to present complex financial information in various reports	Interview Assessment References
22. Ability to challenge others respectfully and constructively	Interview Assessment References
<b>Our values</b>	
23. Respect	Interview Assessment
24. Together	Interview Assessment
25. Accountability	Interview Assessment
26. Openness	Interview Assessment
27. Curiosity	Interview Assessment
<b>Other</b>	
28. Ability to maintain and develop knowledge of financial and other issues	
29. Knowledge relevant to the service area specified	
30. Resilience under pressure	
31. Ability to fulfil the travel requirements of the post	
32. An Enhanced DBS check is required	

## Desirable

Desirable criteria will be used in the event of multiple applicants meeting the minimum essential requirements and if applicable, will be assessed through a combination of your application form, assessment, interview and references (as specified below). If you meet the desirable criteria, we will require evidence of the qualifications, training or registrations listed below.



Qualifications, training or registrations	Assessed through:
33. Commitment to continuing professional development	Application form
<b>Experience</b>	
34. Experience of team planning and objective setting	Application form Interview Assessment
35. Development and implementation of financial systems	
<b>Knowledge</b>	
36. Detailed knowledge of financial issues specifically relating to Local Government, including the service specific area for which the post will have responsibility	Application form Interview Assessment

## Approval

Manager's job title: Head of Service – Health, Education & SEND Commissioning  
Date: March 2025

