

# Role Profile

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## SECTION 1 Brief Description

Role Title: Senior Finance Business Partner

Reports to: Head of Finance & Performance

Grade: Grade K

Team/Service: Finance & Performance

Profile updated: January 2025

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## SECTION 2 Job Family Description

**Corporate Managers** – Responsible for managing functions and activities which are required to ensure the effective functioning of the organisation as a whole. Responsible for ensuring the delivery of the team's objectives the management, supervision and development of team members and contributing to and on occasion leading cross-organisational projects.

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

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## SECTION 3 Role Purpose Including Key Outputs

To support the Head of Finance & Performance in delivering high quality, efficient and effective finance and accountancy support for the organisation, delivering excellence as a corporate support function to the frontline delivery arms of Pension Administration and Investment Strategy.

To support the Head of Finance & Performance in providing strategic advice to the Authority's elected members and to officers in relation to financial matters and provide effective oversight of contractual relationships within the scope of financial services. To project manage the implementation of new software systems and contracts, and to ensure that benefits are realised for the efficiency and effectiveness of the service area.

The post holder will be responsible for the day to day management of a team made up of a CIPFA Trainee Accountant, a Senior Finance Officer, Finance Officers, and an Apprentice; monitoring team and individual performance to ensure that the organisation meets its obligations and service standards in accordance with all relevant legislation, codes of practice and professional guidance. They will work collaboratively with colleagues at all levels across the organisation. Additionally, they will work closely with the Finance Business Partner to support the oversight of their team, ensuring adequate resourcing across the two teams. They will work collaboratively with colleagues at all levels across the organisation.

The post holder will be focussed on the Authority's Strategic Finance processes, whilst ensuring the Finance Business Partner is supported on the Operational Finance processes. They will ensure all balance sheet reconciliations are completed and reviewed, budget monitoring is actively completed by responsible managers across the Authority and robust protocols and procedures are in place and followed across the two Finance teams. They will support the Head of Finance & Performance in co-ordinating and producing the Medium Term Financial Strategy, annual budgets, financial statements and the annual report, as well as other financial reporting, maintaining the finance system; ensuring the completion of statutory and other Government returns, and completing annual benchmarking exercises.

They will be expected to liaise effectively with the Authority's internal and external auditors in particular, and with other external stakeholders as required.

A manager of people is expected to be a role model, leading by example in line with the values and behaviours of the organisation, and to support and encourage those individuals for whom they are responsible: to manage workloads, motivation and morale across the team, driving continuous improvement.

They will be expected to retain a thorough working knowledge of all aspects of the finance and accountancy work of the team and will provide technical advice, guidance and training for colleagues at all levels within and outside the team.

The post holder will support the Head of Finance & Performance in driving forward the continuous improvement agenda of the whole team. Additionally, they will be expected to contribute to setting the service area's strategic objectives and goals.

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## **SECTION 4 Team Context**

The Finance team is responsible for the provision of customer focussed financial management support for the Authority and its managers. The work of the team includes processing and accounting for contributions income and pension benefits payable, investment transactions, the collection of income, payment of creditors, staff payroll, reconciliation of bank accounts, treasury management, annual accounts, budget preparation, financial forecasts, systems maintenance and the maintenance of financial controls. The performance element of the service area focuses on data-driven performance management and reporting, along with ensuring that projects across the Authority are delivered efficiently and effectively.

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## **SECTION 5 Line Management**

Between 4 and 8.

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## **SECTION 6 Role Summary**

Roles at this level typically have significant management responsibility either for a large team or coordinating sub functions within a service, and/or will provide professional, specialist or high level technical advice, direction and input across a wide range of activities. They require a conceptual understanding of a technical, professional or specialised field, and job holders require the knowledge and experience to handle and resolve complex issues, anticipate problems and recommend solutions.

There will be a requirement to plan and organise own and/or team activity over a significant timescale and coordinate work with associated functions. They will typically be required to influence/motivate others, both inside and outside immediate reporting lines, including external stakeholders, and have a primary role in setting service levels.

They ensure that their services achieve the agreed financial and service standards and will have professional autonomy and discretion within organisational policies and practice guidance.

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## **SECTION 7 Budget Responsibility**

None directly, however the post holder is expected to support the Head of Finance & Performance in managing the Authority's operating budget (c.£8 million p.a.) and for forecasting and reporting on the Pension Fund's £11 billion of investments effectively.

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## **SECTION 8 Representative Accountabilities**

### **Analysis, Reporting & Documentation**

- Advise on the analysis and interpretation of data, identifying trends and test solutions, present results and put forward recommendations to support the resolution of issues and support decision making.

## **Service Delivery**

- Advise on the analysis and interpretation of data, identifying trends and test solutions, present results and put forward recommendations to support the resolution of issues and support decision making.
- Apply specialist/professional expertise and use judgement to make decisions where solutions are not obvious, to deliver services that meet stakeholder requirements and service standards.
- Ensure professional and quality service standards are maintained and applied within the area of activity.

## **Planning & Organising**

- Lead or contribute to the operation of an efficient and effective service ensuring the work of the team supports service plans and that necessary resources are secured.
- Lead major projects and reviews within a defined area of work to support and enhance service delivery.

## **Work with Others**

- Liaise internally and externally to ensure the department/service issues are appropriately represented and acted upon.
- To promote a strong culture of collaboration within and beyond the team.
- Act as a source of advice and support for the wider organisation in relation to technical accounting and financial rules and procedures.

## **People Management**

- Directly or matrix manage a diverse group of staff to ensure the successful delivery of a service.
- Monitor and support the performance management and development of team members using a coaching approach, to support individual development and ensure the individual contributions are maximised.

## **Organisational**

- **Values** – To uphold the values and behaviours of the organisation in self and others.
- **Equality & Diversity** – To work inclusively, with a diverse range of stakeholders, and promote equality of opportunity.
- **Health, Safety & Wellbeing** – To maintain high standards of Health, Safety and Wellbeing at work and take reasonable care for the health and safety of self and others. To have regard to and comply with the safeguarding policy and procedures as appropriate.

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## **SECTION 9 Education, Knowledge, Skills & Abilities**

- Educated to Level 7 qualification standard, or significant vocational experience showing development in a series of progressively more demanding relevant work roles.
- Strong financial and budget management skills and knowledge.
- Detailed knowledge of the accountancy and financial frameworks within which LGPS and / or Local Government operate.
- Knowledge of principles and practices relating to business planning and financial and organisational management.
- Proven written and oral communication and interpersonal skills with the ability to work collaboratively with internal and external partners/professionals.
- Previous management experience including staff supervision, development, and organisational skills.
- Proven problem-solving skills with the capacity to devise and implement innovative solutions.
- Ability to work on own initiative, with solution focused problem solving skills.
- Ability to manage a range of projects through to completion.

- Develops personal effectiveness and shows a commitment to personal and professional development.
- Extensive knowledge of computerised financial systems in terms of functionality and capability.
- Ability to apply health and safety, equality and diversity, and other SYPA policies and procedures.

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## SECTION 10 Specific Qualifications and/or Experience

- Professional accountancy qualification from a member body of CCAB; preferably CIPFA.
- Current membership of relevant accountancy body and evidence of up-to-date CPD.
- Significant professional experience in a public sector finance role; specific experience within Local Government and/or the Local Government Pension Scheme would be an advantage.
- Experience of translating strategic objectives into operational plans.
- Experience in managing staff in a financial environment.

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## SECTION 11 Values expected to be demonstrated at all times

### HONEST & ACCOUNTABLE:

Telling it like it is, and taking responsibility for our actions even when we have made a mistake.

### PROFESSIONAL:

Being highly skilled and competent and managerially applying rationality to decision making processes.

### PROGRESSIVE:

Welcoming of change, while taking sensible risks and learning from our mistakes and from others.

### EMPOWERING:

Providing the freedom for individuals to identify and implement solutions to problems.

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## SECTION 12 Management Behaviours Expected to be demonstrated at all times

<i>Management Behaviours</i>	<i>Demonstrated by:</i>
We model positive behaviours to each other and to all staff	<ul style="list-style-type: none"> <li>• We regularly offer encouragement and praise for positive behaviours.</li> <li>• We challenge inappropriate and unacceptable behaviour.</li> <li>• We give and receive authentic feedback.</li> <li>• We hold staff to account for their performance.</li> </ul>
We take responsibility for improvement - within a clear framework	<ul style="list-style-type: none"> <li>• We get on with making improvements and changes rather than wait for permission (within a clear advice frame that sets out what we can get on with and what we can't).</li> <li>• We trust people to do their job, we don't micromanage.</li> <li>• We give a heads up when we plan something new, we speak up early when there is a problem or when things aren't going well.</li> <li>• When something doesn't go well, we look for what we can learn and what we can do differently next time.</li> </ul>

<b>Management Behaviours</b>	<b>Demonstrated by:</b>
We all get behind a common goal	<ul style="list-style-type: none"> <li>• We have a clear vision that sets out what our goals are and clear priorities which set out what our most important changes are.</li> <li>• We make the time to understand what we need to do to contribute to that vision.</li> <li>• We work together across the organisation and contribute to the organisation as a whole.</li> <li>• We challenge and question rumours and use discretion in sharing what gets discussed amongst managers.</li> </ul>
We involve and engage people in decisions that will affect them	<ul style="list-style-type: none"> <li>• We keep people in the loop about things that will affect them.</li> <li>• We seek and value the opinion of the people we manage and of other teams.</li> <li>• We take the time to set out plans then listen to the concerns and recommendations of those involved as to how we can strengthen those plans.</li> <li>• We communicate regularly and clearly to all staff.</li> </ul>

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*South Yorkshire Pensions Authority is an equal opportunity employer and values diversity.*

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