

## Job profile

### Service and job specific context statement

<b>Directorate:</b>	Central Services
<b>Service:</b>	Strategic Resources – Financial Management Services to Schools (FMS) Team
<b>Post title:</b>	Associate Senior School Financial Consultant
<b>Grade:</b>	M
<b>Responsible to:</b>	Head of Finance – Schools & Early Years
<b>Staff managed:</b>	None
<b>Date of issue:</b>	September 2019
<b>Job family:</b>	<b>P&amp;T - Professional &amp; Technical</b>

### Job context

The FMS Team / Financial Consultancy to Schools Service is a traded service with over 300 school and academy customers and an annual turnover in excess of £1.2M.

The Team offers a range of specialist financial and school business management services.

A significant element of the role is the provision of a specialist consultancy service to Headteachers and Governing Bodies in schools and academies in the management of financial resources and the achievement of Best Value principles.

The continued success and development of these services is dependent upon delivering high quality services which meet the needs of customers.

This is a customer facing role and requires the establishment of strong relationships with school and academy customers. Schools and academies can face significant financial and staffing difficulties, it is therefore essential that the service provided recognises this and is professional and sensitive to the schools' circumstances. The strategic nature of the job provides a significant role in maintaining the strong, vibrant team culture within the FMS Team.

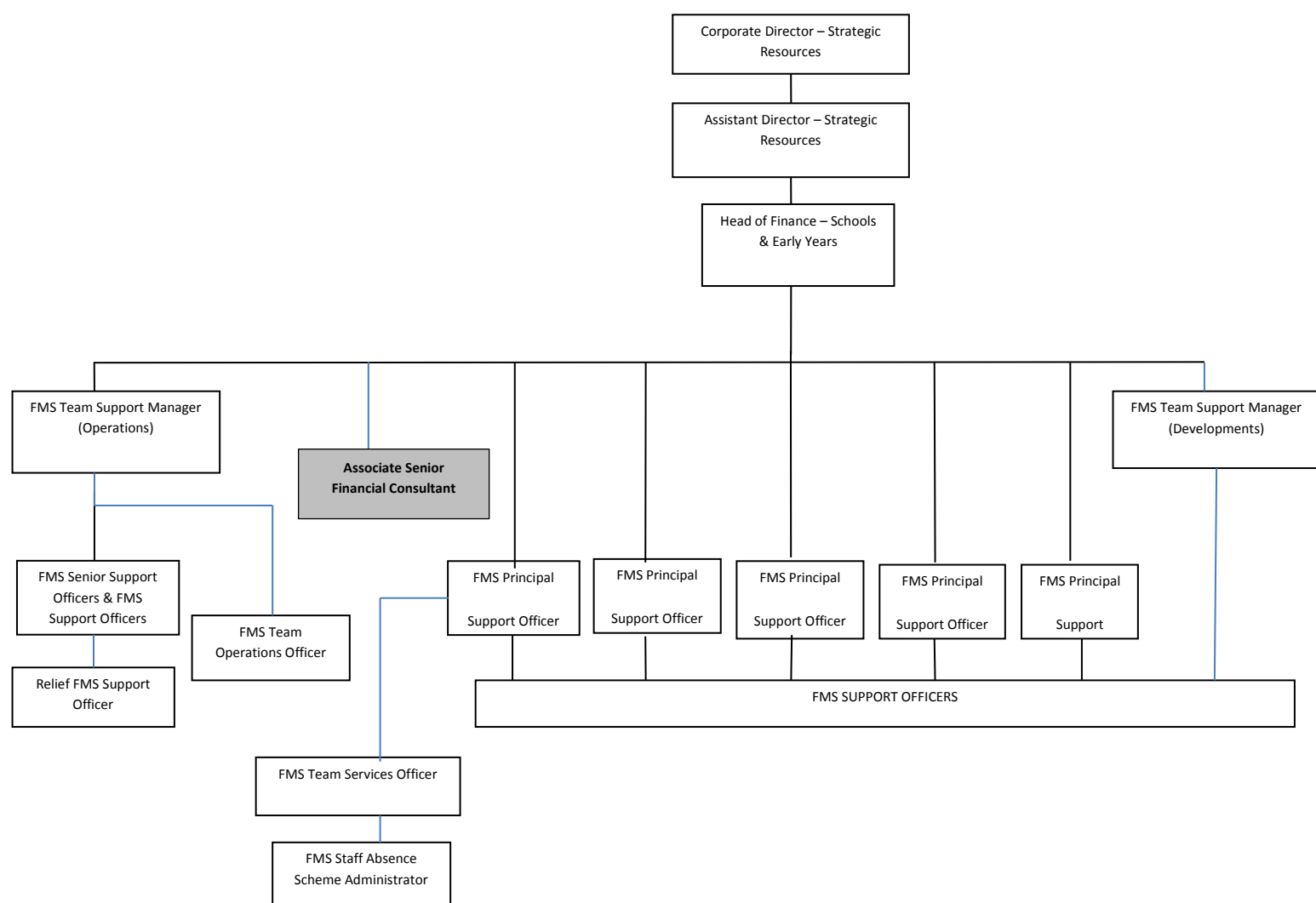
Subject to work requirements, the postholder will operate from home as the work base. The job involves travel to visit school and academy customers and also to support FMS Team staff. The job involves some evening work with attendance at school governor meetings, training sessions and Local Authority convened meetings.

The post requires DBS clearance.

An ability to fulfil all spoken aspects of the role with confidence through the medium of English.

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### Structure



## Job profile

### Job Description

<b>Job purpose</b>	<p>The role has two key areas of responsibility within the Financial Management Services to Schools (FMS) Team. These are:</p> <ul style="list-style-type: none"> <li>To provide specialist consultancy services to Headteachers and Governing Bodies in schools and academies in the management of financial resources and the achievement of Best Value principles.</li> <li>To deliver professional financial and school business management services to primary schools, secondary schools, special schools and academies. The role works with Headteachers and Governing Bodies to deliver the strategic financial and business vision of the school.</li> </ul>
<b>Operational management</b>	<ul style="list-style-type: none"> <li>Provision of a specialist consultancy service to Governing Bodies of schools and academies experiencing financial difficulties.</li> <li>Provision of specialist consultancy services to secondary schools and academies.</li> <li>Delivery of the FMS Team training programme.</li> <li>Provision of FMS advice and consultancy services, bursar services, and helpline service when required.</li> <li>As required, to undertake learning and development programmes to ensure an up to date knowledge of current issues in financial management for schools is maintained.</li> </ul>
<b>Communications</b>	<ul style="list-style-type: none"> <li>Presentation of strategic financial management advice and guidance to school and academy leadership and management.</li> <li>To ensure there is effective communication by the FMS Team with its school customers, other Local Authority service units and external partners.</li> </ul>
<b>Resource management</b>	<ul style="list-style-type: none"> <li>Production of regular budget monitoring reports for schools and academies.</li> <li>Production of statutory financial returns to comply with required accounting standards, including those of the Department for Education, Charities Commission and other relevant bodies.</li> </ul>
<b>Systems and information</b>	<ul style="list-style-type: none"> <li>Development and implementation of school financial systems and processes including accounting software and budget planning financial software.</li> </ul>
<b>Strategic management</b>	<ul style="list-style-type: none"> <li>To support the Head of Finance – Schools &amp; Early Years and the FMS Support Manager in the development of new and existing services within the FMS Team, and where required take a lead role in these developments.</li> <li>To undertake a lead role in the provision of financial advice, information and guidance in the Local Authority strategic school reviews.</li> <li>To undertake a lead role in supporting schools causing financial concern within the Local Authority, including liaison with other Local Authority service areas e.g. the Quality and Improvement Service and the HR Service.</li> <li>Provision of advice and guidance to Governing Bodies to enable them to make effective resource deployment decisions.</li> <li>To undertake school resource management reviews including advising schools and academies on the alignment of their curriculum and financial strategic plans.</li> <li>Production of budgets and long term financial forecasts for schools and academies.</li> <li>Preparation of financial benchmarking information for Governors.</li> <li>Assisting school leadership and management in preparing the schools' balances policy.</li> <li>Assisting with the self-evaluation of financial management procedures in schools and academies.</li> <li>Assistance in preparing and reviewing the school's Budget Management Policy.</li> </ul>

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Person Specification	
Essential upon appointment	Desirable on appointment
<b>Knowledge</b> <ul style="list-style-type: none"> <li>• In depth knowledge of budget preparation, management and monitoring</li> <li>• In depth knowledge of school financial management legislation and processes</li> <li>• Knowledge of Microsoft Office, especially Excel</li> <li>• Knowledge of staff, organisational, change and project management processes and techniques.</li> </ul>	
<b>Experience</b> <ul style="list-style-type: none"> <li>• Significant experience in financial management and the provision of financial support</li> <li>• Experience of supporting schools in the financial management of their resources</li> </ul>	
<b>Occupational Skills</b> <ul style="list-style-type: none"> <li>• Budget preparation, management and monitoring</li> <li>• Problem solving and analytical skills</li> <li>• Target setting, financial performance appraisal, quality standards</li> <li>• Good written and presentation skills</li> <li>• Effective communication skills including influencing and negotiation</li> <li>• Commitment to Service Delivery and Customer Care</li> <li>• Ability to prioritise and assimilate new initiatives, technology and software.</li> <li>• Good interpersonal skills.</li> </ul>	<ul style="list-style-type: none"> <li>• Promotion of Organisational Policy Objectives</li> <li>• Staff development and motivation</li> </ul>
<b>Professional Qualifications/Training/Registrations required by law, and/or essential for the performance of the role</b> <ul style="list-style-type: none"> <li>• AAT or equivalent qualification required</li> </ul>	<ul style="list-style-type: none"> <li>• Able to demonstrate evidence of formal professional development in management skills</li> </ul>
<b>Other Requirements</b> <ul style="list-style-type: none"> <li>• Current driving licence and availability of a vehicle for work purposes</li> <li>• Ability to travel for work purposes</li> <li>• Ability to attend meetings outside of normal business hours</li> </ul>	
<b>Behaviours</b>	<a href="#">Link</a>

NB – Assessment criteria for recruitment will be notified separately.