

Job profile

Service and job specific context statement

Directorate:	Central Services
Service:	Strategic Resources: Financial Management Services, Schools and Academies
Post title:	Senior Financial Consultant, Schools and Academies
Grade:	M
Responsible to:	Head of Financial Management Services, Schools and Academies
Staff managed:	Manages a team of specialist professionals
Date of issue:	June 2020
Job family:	P&T - Professional & Technical

Job context

Financial Management Services (FMS) is part of North Yorkshire Educational Services (NYES) and provides financial advice and support to over 300 schools and academies on a traded basis. The service has a turnover in excess of £1.2m per annum, excellent customer retention rates, and has a reputation for delivering high quality valued support to clients.

The post holder is part of the FMS Management Team and therefore has a key role in shaping and managing the service and in ensuring service priorities are successfully delivered.

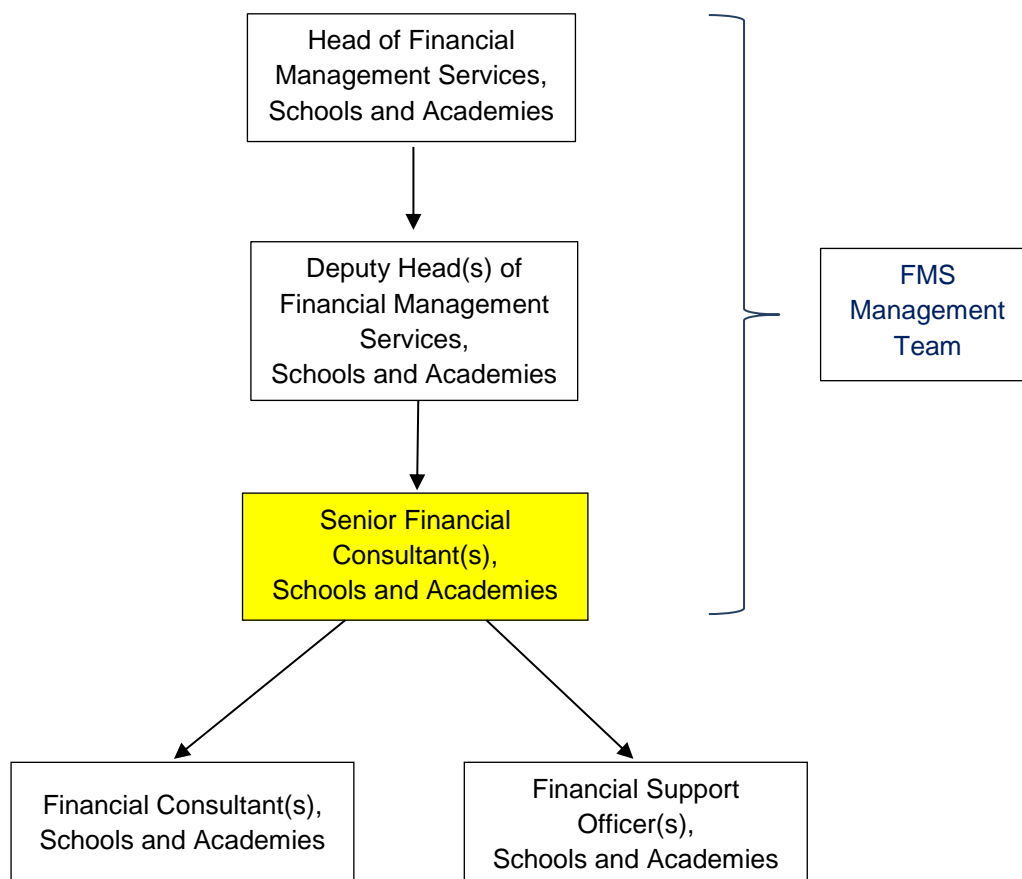
The post holder's responsibilities include:

- Delivery of outstanding services to more complex clients;
- Establishing strong relationships with clients and ensuring delivery of a value added service;
- Line management responsibility for a team of specialist professionals;
- Assisting with service and product development;
- Promoting the service to current and potential clients;
- Delivery of training;
- Keeping up to date with sector developments, guidance and best practice.

Subject to work requirements, the job can be either based at County Hall or can operate from home as the work base. The job involves travel to visit school and academy clients across North Yorkshire and its surrounding counties, and also to support the team. The job involves some evening work with attendance at governor meetings, training sessions and local authority convened meetings. The post can be either full year or term time only.

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Structure



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Job Description

Job purpose	<ul style="list-style-type: none"> To deliver high quality services to school and academy clients to enable them to effectively manage their resources and contribute to maximising pupil outcomes. To be a member of the FMS Management Team and undertake a key role in ensuring service priorities are successfully delivered. To line manage a team of specialist professionals.
Operational management	<ul style="list-style-type: none"> Manage a team of specialist professionals, providing the necessary support required for staff operating on an independent basis from a home base. Responsibility for the successful delivery of services to clients. Responsibility for monitoring service delivery of the team including supervision, reviewing work, adherence to deadlines and ensuring high levels of client satisfaction. Provision of specialist and strategic consultancy and advice, including ad hoc project work. Delivery of training to clients as part of the FMS programme of events. Responding to issues raised by clients in a timely manner. Deputise for Head/Deputy Head of Financial Management Services, Schools and Academies, as required. Undertake a lead role in the provision of financial advice, information and guidance in supporting schools causing financial concern within the local authority through targeted reviews. Undertake resource management reviews including advice on the alignment of curriculum and financial planning, and benchmarking data. Produce budgets and long term financial forecasts with school and academy leaders and present these to governors/trustees. Advise schools and academies on savings generation and effective resource deployment to ensure sustainability. Advise schools and academies on financial procedures, policies, and adherence to local and statutory requirements.
Communications	<ul style="list-style-type: none"> Regular communication with clients in line with contractual obligations. Provision of ad hoc advice and guidance to clients as required. Ensure effective communication within the service in order for staff to be fully aware of service and sector requirements and developments. Ensure effective communication with other NYES traded services, local authority officers and external partners. The role will involve working with school leaders, governors/trustees, local authority officers, and other stakeholders on a regular basis.
Resource management	<ul style="list-style-type: none"> Provide leadership, management and direction to a team of specialist professionals, ensuring staff are clear about what is expected of them, are kept informed about their performance and are enabled to develop the necessary skills and knowledge through supervision, appraisal and development opportunities. Carry out people management issues such as recruitment, absence management, health and safety, setting targets, providing feedback on performance and effectively addressing development and learning issues. Support the FMS Management Team in ensuring that there is efficient and effective co-ordination of resources within the service, to produce outputs as required.

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Systems and information	<ul style="list-style-type: none"> • Ensure clients have access to appropriate financial systems including accounting software and financial planning software, and are supported, as requested, in their usage of the software packages. • Using the client's financial systems including accounting software and budget planning financial software. • Ensure effective and timely analysis of delivery against resource plan and projected performance. • Maintain and promote a consistent approach towards service delivery and use of systems. • Keep up to date with sector developments, best practice and statutory guidance.
Strategic management	<ul style="list-style-type: none"> • The post holder is part of the FMS Management Team which plans, leads and manages service developments, operations and performance. • Support the Head/Deputy Head of Financial Management Services, Schools and Academies in the development of new and existing services, and where required take a lead role in these developments. • Contribute to the development and performance management of the service through effective team and individual performance planning, monitoring and review. • Keep the service offer under review and propose changes to procedures and working methods that will improve the efficient use of resources and effectiveness of service delivery to clients.

Person Specification

Essential upon appointment	Desirable on appointment
Knowledge <ul style="list-style-type: none"> • In depth knowledge of budget preparation, management and monitoring • Knowledge of Microsoft Office, especially Excel • Knowledge of school financial management legislation and processes • Knowledge of staff, organisational, change and project management processes and techniques. 	<ul style="list-style-type: none"> • School and/or academy specific knowledge
Experience <ul style="list-style-type: none"> • Significant experience in financial management and the provision of financial support • Experience of staff management, meeting targets and delivering high quality customer service levels 	<ul style="list-style-type: none"> • Experience of supporting schools and/or academies in the financial management of their resources
Skills <ul style="list-style-type: none"> • Ability to manage, develop and motivate staff • Ability to meet targets • Ability to produce accurate high quality work • Excellent communication skills; both written and oral • Ability to interpret and analyse financial and non-financial information and to advise on, and make recommendations for improvement where necessary • Commitment to high quality service delivery and client care • Competent in reviewing the work of others both numerical and written 	<ul style="list-style-type: none"> • Ability to deliver strategic support to schools and/or academies

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<ul style="list-style-type: none"> • Ability to prioritise and assimilate new initiatives, technology and software • Good interpersonal skills • Good influencing and negotiating skills 	
Professional Qualifications/Training/Registrations required by law, and/or essential for the performance of the role <ul style="list-style-type: none"> • AAT (Association of Accounting Technicians) full membership and/or educated to degree level. 	<ul style="list-style-type: none"> • Able to demonstrate evidence of formal professional development in management skills • CCAB accounting qualification or equivalent.
Other Requirements <ul style="list-style-type: none"> • Ability to travel across the county and region • Ability to attend meetings outside of normal business hours 	
Behaviours	Link

NB – Assessment criteria for recruitment will be notified separately.