



Job profile

Service and job specific context statement

Directorate:	Central Services
Service:	Strategic Resources: Financial Management Services, Schools and Academies
Post title:	Financial Support Officer, Schools and Academies
Grade:	J
Responsible to:	Senior Financial Consultant, Schools and Academies
Staff managed:	None
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's responsibilities include:

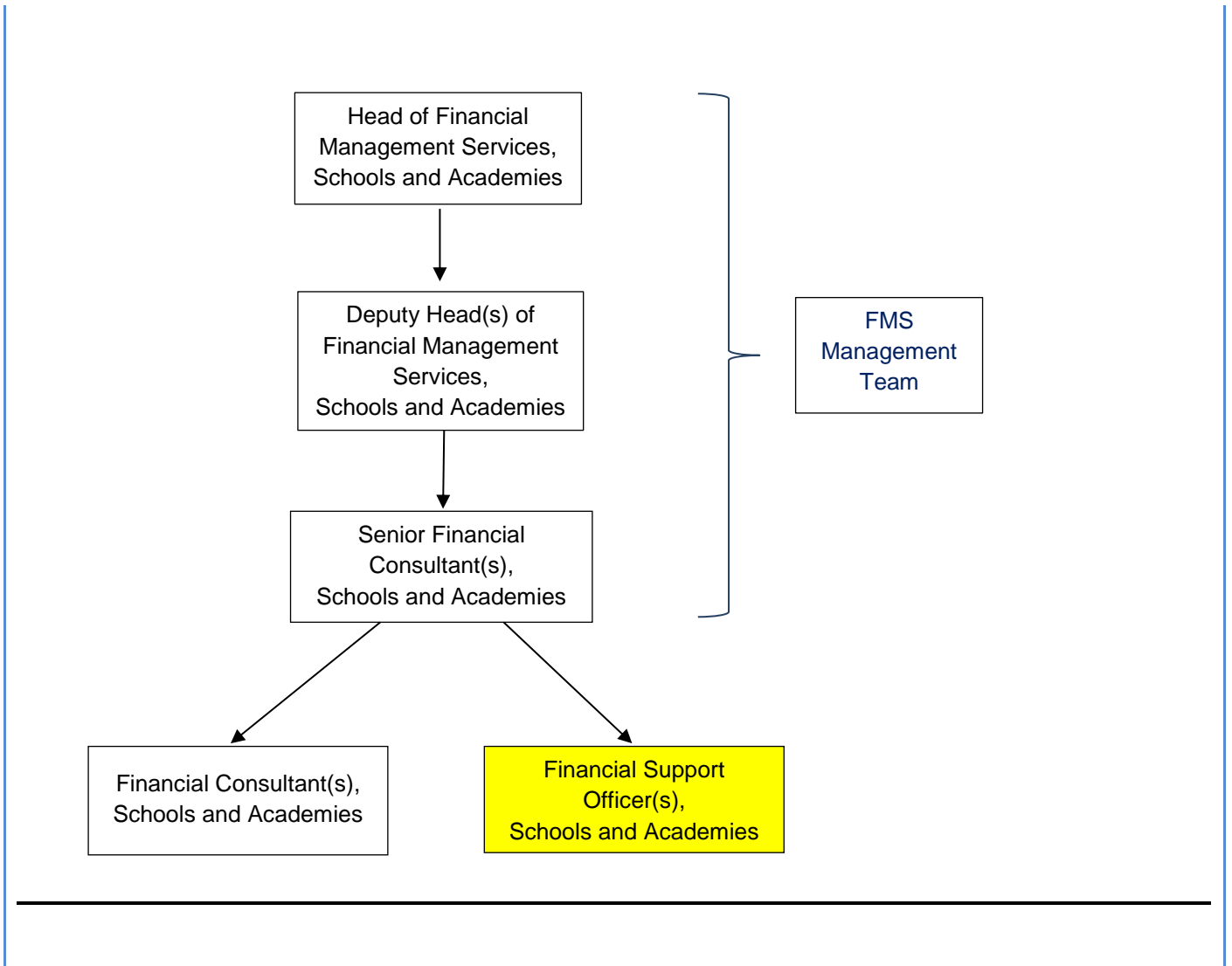
- Delivery of outstanding services to clients;
- Establishing strong relationships with clients and ensuring delivery of a value added service;
- Assisting and supporting the FMS Management Team with service and product development;
- Promoting the service to current and potential clients;
- Keeping up to date with sector developments, guidance and best practice.
- Supporting colleagues and assisting with training, advice and guidance where required.

The role operates from home as the work base. The job involves travel to visit school and academy clients across North Yorkshire and its surrounding counties. The job involves some evening work with attendance at governor meetings, training sessions and local authority convened meetings. The post is term time only plus one additional week.



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Structure





Job profile

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.
Operational management	<ul style="list-style-type: none"> Responsibility for the successful delivery of services to clients including adherence to deadlines and ensuring high levels of client satisfaction. Responding to issues raised by clients in a timely manner. 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 to understand and 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"> To support colleagues and provide one to one training, advice and guidance where required. 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.
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 delivery against allocated resource plan. 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"> Support the FMS Management Team in the development of new and existing services. Contribute to the development of the service through effective personal performance planning, monitoring and review. Continuously review the service offer and, if necessary propose changes to procedures and working methods that will improve the efficient use of resources and effectiveness of service delivery to clients.



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Person Specification	
Essential upon appointment	Desirable on appointment
<p>Knowledge</p> <ul style="list-style-type: none"> In depth knowledge of budget preparation, management and monitoring Knowledge of Microsoft Office, especially Excel 	<ul style="list-style-type: none"> School and/or academy specific knowledge Knowledge of school financial management legislation and processes
<p>Experience</p> <ul style="list-style-type: none"> Experience in financial management and the provision of financial support Experience of 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
<p>Skills</p> <ul style="list-style-type: none"> 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 Ability to prioritise and assimilate new initiatives, technology and software Good interpersonal skills 	<ul style="list-style-type: none"> Ability to deliver strategic support to schools and/or academies
<p>Professional Qualifications/Training/Registrations required by law, and/or essential for the performance of the role</p> <ul style="list-style-type: none"> AAT (Association of Accounting Technicians) full membership and/or equivalent relevant qualification. 	
<p>Other Requirements</p> <ul style="list-style-type: none"> Ability to travel across the county and region Ability to attend meetings outside of normal business hours 	
<p>Behaviours</p>	<p>Link</p>

NB – Assessment criteria for recruitment will be notified separately.