

**JOB DESCRIPTION AND PERSON SPECIFICATION**

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| Job Title: | Senior School Finance Officer |
| HBC Grade: | **HBC7/8** |
| Service: | **Financial Management** |
| Division: | **Enterprise, Community, Resources and Schools Team** |

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| **Main Purpose of the Role** |
| To ensure the effective delivery of a range of financial services to schools in accordance with a Service Level Agreement and to be the primary financial advisor to Head Teachers and Governors of SLA Schools. |

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| **Key Duties** | |
| **1** | To interpret the financial implications of the Schools Funding Formula, in order to advise Head Teachers and Governors regarding the preparation of School budgets within approved timetables. |
| **2** | To ensure that School budgets are prepared in accordance with Financial Regulations and the Halton Scheme for Financing Schools. |
| **3** | To ensure the School Finance Officers are effectively trained, deployed and supervised, in order to provide a range of financial services to Schools in accordance with the Service Level Agreements. |
| **4** | To provide advice on the preparation of financial reports to Governing Bodies, in order to enable effective management decisions to be taken both for initial budget setting and subsequent in-year monitoring. |
| **5** | To identify and monitor the progress of Schools with particular financial difficulties, in order to provide advice and support to Head Teachers and Governors and thereby assist them in resolving the situation. This will include attendance at Governing Body and other meetings as required. |
| **6** | To ensure the provision of accurate and timely financial information to Schools. |
| **7** | To provide training in budget management and financial administration for Head Teachers and School Administrative Staff. |
| **8** | To liaise with Human Resources regarding the financial implications of personnel policies adopted by the Council in respect of School staff and the subsequent impact upon School budgets. |
| **9** | To advise Schools regarding their use of various other grants in order to optimise their use. |
| **10** | To attend and contribute to departmental and inter-authority working groups as required. |
| **11** | To liaise with Government Departments, other Councils, and other external bodies, as required. |
| **12** | To offer additional ad hoc financial services as and when required including providing schools resource management related advice to help schools reduce costs and get value for money. |
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| **13** | Undertaking any other duties and responsibilities as may be assigned from time to time, which are commensurate with the grade of the job |
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The Council and its schools are committed to safeguarding and promoting the welfare of children, young people and adults and expect all staff, workers and volunteers to share its commitment.

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| **Education / Qualifications** | **Essential** | **Desirable** | **How Identified** |
| Member of the Association of Accounting Technicians, part qualified CCAB accountant, or equivalent. | Part-qualified CCAB accountant or equivalent. | All essential qualification certificates must be presented at interview. |

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|  | **Experience** | **Knowledge** | **Skills & Abilities** | **How Identified** (delete as appropriate for each criteria) |
| **ESSENTIAL** | Relevant experience in an accountancy environment. | Knowledge of public sector accounting and finance. | Ability to write reports dealing with complex financial issues in a clear and concise manner. | Application / Interview /Assessment |
|  | Knowledge of schools revenue and budgeting processes. | Excellent oral communication skills. | Application / Interview /Assessment |
|  |  | Confidence in liaising with Head Teachers, governors and senior officers. | Application / Interview /Assessment |
|  |  | Ability to plan and supervise the work of staff, including contributing to their training and development. | Application / Interview /Assessment |
|  |  | Highly organised and able to plan and prioritise work. | Application / Interview /Assessment |
|  |  | Ability to consistently achieve tight deadlines. | Application / Interview /Assessment |
|  |  | Excellent analytical skills, in order to evaluate and report upon financial data. | Application / Interview /Assessment |
| **DESIRABLE** | Experience of working in a local government finance environment within schools. | Understanding of local government accounting and finance requirements. | Ability to provide creative and innovative solutions to issues and problems. | Application / Interview /Assessment |
|  | Knowledge of Schools Formula Funding. | Ability to use initiative and make sound judgements. | Application / Interview /Assessment |
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| **Other Requirements** | **Essential** | **Desirable** | **How Identified** |
| Highly developed information technology skills, including both mainframe and PC based systems, and being able to apply this appropriately to facilitate the achievement of objectives. |  | Interview / Assessment / Documentation |
| Excellent knowledge of Microsoft Excel and the ability to use Word, e-mail and the Internet. |  | Interview / Assessment / Documentation |
|  |  | Interview / Assessment / Documentation |

Please note: Front line posts with direct customer contact should include a statement detailing the spoken English language requirements of the post.

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For office use only:

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| **Date Created:** |  |
| **JE Ref:** |  |
| **Agreed by:** |  |

This job description is not intended to be either prescriptive or exhaustive; it is issued as a framework to outline the main areas of responsibility.