

## Role profile

<b>Job Title:</b>	<b>Schools Bursarial Service Senior Support Officer</b>	<b>Grade:</b>	12
<b>Department:</b>	Planning, Resources and Service Development	<b>Post no.:</b>	
<b>Directorate:</b>	Childrens Services	<b>Location:</b>	Perceval House

<b>Role reports to:</b>	School Bursarial and Resources Strategic Lead
<b>Direct reports:</b>	0
<b>Indirect reports:</b>	School Finance Officer, School Administrator, Administrative Assistant, School Caretaker at Maintained Schools <i>(when acting as a school business manager)</i>

## Job description

Recruitment practices to safeguard and promote the welfare of children and/or vulnerable adults apply to this post in addition to the requirement to obtain a Disclosure and Barring Service (DBS) check.

### Purpose of role

- As a Schools Bursarial Service senior support officer to deliver strategic, operational and complex financial management advice, support and training to headteachers, governors, school business managers, bursars, finance officers and school administrators.
- Working as part of a virtual team to develop the service to maintain and increase buy back.
- As and when required as a School Business Manager to provide high-level strategic support for headteachers and governors as a member of the senior leadership team on finance, HR, facilities management, environment, risk management, health & safety.

### Key accountabilities

- To set a sustainable 3 year revenue budget and budget strategy based on the school improvement plan and vision and ethos of the school.
- To support the Head of Service on recruitment issues arranging advertising, shortlisting, the interview panel, the interview the questions or tests and the induction program for the successful candidate.
- To maximise income as a bursarial officer and school business manager by being innovative at generating income from existing resources, creating business cases for consideration by the Head of Service or school Head.

- Acting on behalf of the Head of Service to generate sufficient income to cover the cost of delivering the bursarial service, which receives no support from any central budget, so consequently the service has to sell its service level agreement on an annual basis to schools and to generate a surplus of an agreed amount, which is used to support other services for schools.
- Acting on behalf of the Head of Service to monitor the service's actual financial performance against the budget and to recommend what remedial action is necessary
- Acting on behalf of the Head of Service to ensure that our technological solutions help the service to deliver the benefits of such solutions to our customers and the service
- To look for innovative and alternative ways to raise income by selling additional services to schools and in creating the Service Level Agreement
- To ensure that complaints from customers are dealt within the Council's current level of service requirements and to follow up on any issues generated from the complaints by training and mentoring
- Acting on behalf of the Head of Service to achieve an agreed take-up of the service by schools (Staffing levels relate to the take up of the service by schools)
- To ensure that the service delivers the customer's requirements by being innovative and flexible.
- To develop, in consultation with colleagues in Accountancy, Audit and schools, cost effective and safer systems of financial management, which safeguard the public funds involved and to protect both the school and the Council's reputations. (all schools spend £200M plus annually)
- To keep abreast of legislation and national and local practices, procedures, initiatives and advise schools accordingly, by writing instructions, guidance, briefing notes, manuals and by presentations. In particular those developments in financial management, employment law and site management (including Health & safety)
- To provide consultancy and practical support to schools, possibly at short notice, whose educational standards are giving cause for concern or have received poor audit reports as directed by the assistant director/director.
- To provide locum services to schools where the school's own school business manager, bursar, finance officer is indisposed or the post is vacant pending completion of the recruitment process to ensure continuity of financial services at the school
- To manage, monitor and ensure high professional standards of practice and performance in all areas of service delivery by leading by example. This is particularly important in the school based aspect of this role when dealing directly with members of the public.
- Acting on behalf of the Head of Service lead on business planning for the service, which needs to deliver on the Council's Key Priorities.
- To offer training either individually or as a group to staff and other stakeholder to improve their knowledge and understanding of financial matters relating to schools
- Acting on behalf of the Head of Service to devise and deliver training programs for other members of the service

- To maintain a high level of technical expertise in the Capita Sims suite of management software and other support systems such as HCSS used in schools for the majority of their needs and in particular FSM6 (or any replacement), thus ensuring that financial reports and census returns are accurate
- To ensure that those schools that buy into the school bursarial service have access to an up to date version of the service's budget setting spreadsheet in time for budget setting to assist them to set a balanced budget
- To support the needs of School service's accountancy service and payroll requirements and deadlines with regard to year end, budget setting, CFR & budget monitoring
- To be a keyholder (including access to the safe containing cash and other valuables) if required to be by schools where the school is buying in to the school business manager service level.
- To project manage building works if required to do so by schools where the school is buying in to the school business manager service level.
- To maintain knowledge about I-Trent and be capable to assist school's with using the system for HR enquiries
- To manage school service's remote access system using the Ealing Grid for Learning into School's computer networks
- To manage & arrange the termly admin forum and other meetings, including hosting the event, agreeing the agenda and inviting outside speakers from other services in the council or from third part organisations
- To assist as and when required in new projects that ultimately will benefit schools (e.g. E-procurement, payment by BACS)

### **Key performance indicators**

- To keep customer complaints below an agreed amount, currently 5%
- To ensure that schools comply with Children Service Accountancy are met by schools that buy in
- To generate an agreed surplus, currently £100k.
- To achieve an agreed take-up of the service, currently 85%
- To ensure that our knowledge of latest developments in education and finance is maintained

### **Key relationships (internal and external)**

- **Head of Education Planning, Resources and Sustainability**
- Assistant Director/Director
- Senior Leadership Team (Headteacher, Deputy Headteacher, School Business Managers)
- Audit & Investigation
- Governors both knowledgeable on financial matters and lacking knowledge
- Consultants
- Architects
- Suppliers (e.g. Capita or in schools utility companies, educational suppliers and contractors)
- Schools Accountancy

- HR
- Occupational Health
- Payroll
- DFE
- Education Property (inc Health & safety)
- PFI Team (Private Finance Initiative)

### **Authority level**

- Manage people (Schools)
- Create, Review and Update policies for School Bursarial Staff and School Staff
- Acting on behalf of Head of Service as budget holder of £300K (School Bursarial Service)
- Produce financial management information across a number of schools.

## **Person specification**

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### **Essential knowledge, skills and abilities**

1. Ability when acting as the school business manager, to manage staff recruitment, induction, supervision, performance, and personal development.
2. Ability to identify, evaluate, recommend, create and deliver new and innovative approaches of training and development, for both School based staff and the Bursarial team.
3. Ability to manage change, including leading and managing within a customer care framework using excellent interpersonal skills
4. Ability to provide effective advice and support to all levels of staff (administrators, school business managers, senior leadership team, governing body) to ensure compliance with legislation, statutory guidance and to promote financial best practice.
5. Detailed Understanding of legislation, regulations and statutory requirements in relation to the finance function and knowledge of financial management and administration in schools.

6. Ability to communicate confidently, effectively and clearly in writing and orally with all levels of staff and customers, to explain and train on complex systems and issues to individuals and groups.
7. Ability to work under pressure to a high degree of accuracy, attention to detail, consistency, undertaking multiple tasks, prioritise and meet tight and often conflicting deadlines, with high level organisational skills, ability to work flexibly and prioritise work effectively.
8. Ability to work both individually and as part of a cohesive team in delivering a high quality service, building effective professional working relationships with colleagues at all levels internally and externally.
9. Ability to interpret, recommend and apply policies, procedures, regulation and legislation, for example, LA, central government.

### **Essential qualification(s) and experience**

1. Qualified or part qualified ACA (e.g. ACCA, CIPFA, CIMA) or Diploma of School Business Management level 4 or above. Or Equivalent experience.
2. Experience in a role being responsible for the creation of, and supporting the production, presentation and reporting of all aspects of financial management, budget preparation and monitoring and budget strategy; short, medium, and long term to senior management in a large organisation.
3. Experience of using and developing tools within mainframe financial systems and other related software such as Pupil and Personnel database, including advanced knowledge of spreadsheet software, in particular MS Excel.
4. Working with customers, by email, phone, and face to face level, handling sensitive and challenging issues sympathetically and effectively.
5. Delivering training on an individual and group basis at all levels

## Values and behaviours

Improved life for residents	Trustworthy	Collaborative	Innovative	Accountable
<ul style="list-style-type: none"> <li>• Is passionate about making Ealing a better place</li> <li>• Can see and appreciate things from a resident point of view</li> <li>• Understands what people want and need</li> <li>• Encourages change to tackle underlying causes or issues</li> </ul>	<ul style="list-style-type: none"> <li>• Does what they say they'll do on time</li> <li>• Is open and honest</li> <li>• Treats all people fairly</li> </ul>	<ul style="list-style-type: none"> <li>• Ambitious and confident in leading partnerships</li> <li>• Offers to share knowledge and ideas</li> <li>• Challenges constructively and respectfully listens to feedback</li> <li>• Overcomes barriers to develop our outcomes for residents</li> </ul>	<ul style="list-style-type: none"> <li>• Tries out ways to do things better, faster and for less cost</li> <li>• Brings in ideas from outside to improve performance</li> <li>• Takes calculated risks to improve outcomes</li> <li>• Learns from mistakes and failures</li> </ul>	<ul style="list-style-type: none"> <li>• Encourages all stakeholders to participate in decision making</li> <li>• Makes things happen</li> <li>• Acts on feedback to improve performance</li> <li>• Works to high standards</li> </ul>