



LONDON BOROUGH OF  
RICHMOND UPON THAMES



## Job Profile comprising Job Description and Person Specification

### Job Description

<b>Job Title:</b> Financial Adviser	<b>Grade:</b> P02-3 Link Grade
<b>Section:</b> Schools Finance	<b>Directorate:</b> Children's Services
<b>Responsible to following manager:</b> Team Manager - Schools Financial Advisory Service	<b>Responsible for following staff:</b>
<b>Post Number/s:</b> RWA1021	<b>Last review date:</b> September 2017

#### Working for the Richmond/Wandsworth Shared Staffing Arrangement

This role is employed under the Shared Staffing Arrangement between Richmond and Wandsworth Councils. The overall purpose of the Shared Staffing Arrangement is to provide the highest quality of service at the lowest attainable cost.

Staff are expected to deliver high quality and responsive services wherever they are based, as well as having the ability to adapt to sometimes differing processes and expectations.

The Shared Staffing Arrangement aims to be at the forefront of innovation in local government and the organisation will invest in the development of its staff and ensure the opportunities for progression that only a large organisation can provide.

#### Job Purpose

- Delivers a high quality, professional and cost effective financial support service to Heads and Governing Bodies of schools under a trading account agreement and provides Bursarial services on a temporary basis, covering sickness absence or vacant positions within schools as required.

#### Specific Duties and Responsibilities – P02 Grade

- Visits a group of primary schools on a regular basis (normally monthly) to direct and advise school Finance Officers/Business Managers at those



schools and advise and give guidance to Heads of schools and Governing Bodies on a range of financial functions and Council policies such as the Scheme for Financing Schools, Financial Management Handbook, procurement and best practice.

- Provides schools with strategic and operational budget planning and monitoring, linking with school improvement plans (SIP). Identifies schools with potential budgetary problems and liaises with Headteachers, Governors and the Team Manager in resolving these problems and recommending action plans. Ensures that the schools budgetary control is carried out in accordance with Council policy, maintaining the efficiency of financial forecasting so that spending is kept in line with the agreed budget. Solves financial problems and attends school finance committees as required, to present and explain finance issues
- Provides training for Business Managers, Headteachers, Governors and Departmental Managers on all aspects of finance issues and best practise including multi year budget planning and provides training to finance staff on use of the SIMS FMS module
- Carries out year-end and quarterly financial procedures and reconciliations. Responsible for the reconciliation of their group of schools SIMS data with the Council's accounts on a quarterly basis and agrees year-end carry forward balance calculations by the deadlines set out in the Council's timetable.
- Liaises with other Council departments on a range of matters affecting schools such as audit, payroll queries, superannuation and central charges. Provides advice and guidance on audit findings to Headteachers, Governors and school finance staff.
- Liaises with external agencies and government bodies, for example the DfE, and provides information as requested. Prepares consistent financial reporting (CFR) returns on behalf of their group of schools to enable benchmarking with other schools nation-wide.
- Assists schools and contributes towards their achievement of the Schools Financial Value Standard (SFVS)
- Meets income generation targets for the team by providing a comprehensive Bursarial service in schools as required.

**Progression to the next grade of the post (PO3)**



- As well as schools in the primary sector, carries out the duties listed above for schools in the nursery, secondary and special sectors and academy/free schools who buy into the Schools Financial Advisory Traded Service.
- Represents the Schools Finance section at meetings, Governing Body meetings and Task Group meetings of schools on special measures, with deficit budgets or with serious weaknesses with senior LA officers, Headteachers and Governors.
- Contributes to the policy, development and marketing of the Schools Financial Advisory Traded Service, including promoting the service to academy and out of Borough schools.
- Responsible for the development and provision of training on the financial software (SIMS FMS) both off site, in schools and on pre-arranged courses. Responsible for updating training materials and procedures.
- Contributes towards the development, design and production of the annual School Budget Pack, ensuring that deadline dates are adhered to. Responsible for areas of the Budget Pack as directed by the Team Manager such as salary costings, budget planning spreadsheet and other financial information to enable all schools to produce a budget plan. Ensure information provided is accurate and instructions on use are clear and understandable.
- Trains other team members on non financial school procedures, policies and guidelines and responsible for updating procedure notes.

### **Generic Duties and Responsibilities**

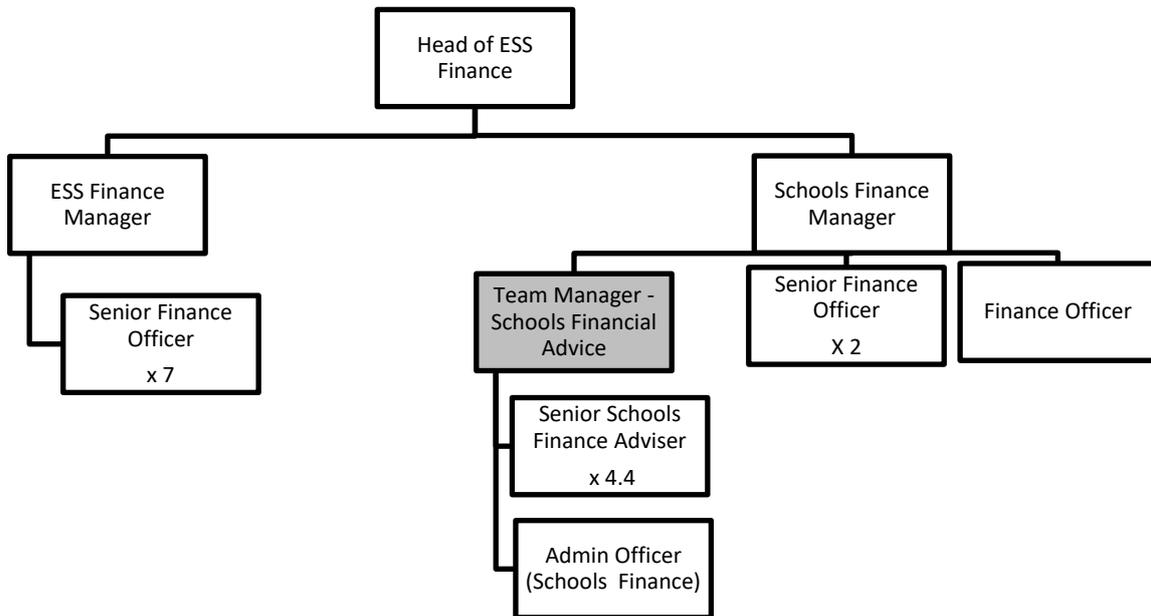
- To contribute to the continuous improvement of the services of the Boroughs of Wandsworth and Richmond.
- To comply with relevant Codes of Practice, including the Code of Conduct and policies concerning data protection and health and safety.
- To adhere to security controls and requirements as mandated by the SSA's policies, procedures and local risk assessments to maintain confidentiality, integrity, availability and legal compliance of information and systems
- To promote equality, diversity, and inclusion, maintaining an awareness of the equality and diversity protocol/policy and working to create and maintain a safe, supportive and welcoming environment where all people are treated with dignity and their identity and culture are valued and respected.



- To understand both Councils' duties and responsibilities for safeguarding children, young people and adults as they apply to the role within the council.
- The Shared Staffing Arrangement will keep its structures under continual review and as a result the post holder should expect to carry out any other reasonable duties within the overall function, commensurate with the level of the post.

**Additional Information**

**Team structure**





## Person Specification

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### Our Values and Behaviours

The values and behaviours we seek from our staff draw on the high standards of the two boroughs, and we prize these qualities in particular:

**Being open.** This means we share our views openly, honestly and in a thoughtful way. We encourage new ideas and ways of doing things. We appreciate and listen to feedback from each other.

**Being supportive.** This means we drive the success of the organisation by making sure that our colleagues are successful. We encourage others and take account of the challenges they face. We help each other to do our jobs.

**Being positive.** Being positive and helpful means we keep our goals in mind and look for ways to achieve them. We listen constructively and help others see opportunities and the way forward. We have a ‘can do’ attitude and are continuously looking for ways to help each other improve.

Person Specification Requirements	Assessed by A & I/ T/ C (see below for explanation)
<b>Knowledge</b>	
1. Knowledge of schools legislation( e.g. employment, health and safety, finance and premises)	A/I
2. Knowledge and understanding of how to interpret numerical /statistical data and to provide clear and understandable reports to both financial and non financial staff.	A/I/T
3. Knowledge of administrative and organisational procedures in schools and the Council.	A/I
4. Understanding of the key factors in the Council’s Equal Opportunities policy	A/I



<b>Experience</b>	
5. Experience of undertaking a wide range of finance, personnel, premises and administrative tasks in schools.	A/I
6. Experience of providing a wide range of financial support and advice to schools or to budget holders within a business setting.	A/I
7. Thorough experience of using financial and other school information systems (SIMS FMS, SIMS.net or similar).	A
<b>Skills</b>	
8. Proven high level literacy, numeracy and communication skills	A/I/T
9. Excellent Microsoft Office skills (Word and Excel particularly)	A/I/T
10. Excellent financial management skills (budget control and setting)	A/I
11. Willingness and capability to be flexible when needed (e.g. attending meetings outside standard hours)	A/I
12. Ability to work under pressure, prioritise and meet deadlines and remain professional at all times	A/I
13. Good organisation and proven administrative abilities.	A/I
<b>Qualifications</b>	
14. Accountancy qualification to AAT technician stage or Business / Finance / Accountancy Qualification at Level 4 or equivalent experience.	A/C

**A – Application form / CV**

**I – Interview**

**T – Test**

**C - Certificate**