 **Job Description**

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| **Department** | **Chief Executives** |
| **Job Title** | FMS Officer |
| **Grade** | E |
| **Primary Purpose of Job** | To provide financial management support to schools. This includes providing advice to headteachers and school-based staff on appropriate policies and financial guidance. |
| **Reporting To** | Schools Finance Manager |
| **Direct Staffing Reports** | N/A |

**Main Duties**

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| **1** | To provide bursary support to schools, as requested in the Schools Finance Unit service level agreement. This support includes undertaking the following duties on the schools’ finance management system (FMS):-   * monthly bursary support * amending budget allocation * CFR apportionments of budget and expenditure * Reconciliation of schools’ monthly accounts for all funds of the school and resolve any complex errors. | |
| **2** | To provide helpline advice to schools on all the above. | |
| **3** | To coordinate the production of finance information from Oracle to schools. | |
| **4** | To advise schools on the interpretation of CFR financial reporting framework and to respond to any proposed changes to the requirements. | |
| **5** | To supervise school-based staff on site in the use of FMS and financial procedures This involves ensuring school-based staff are complying with financial procedures. | |
| **6** | To design, deliver and organise training for finance staff in schools on all aspects of FMS both in formal training courses and 1:1. This involves motivating and building confidence in school-based staff | |
| **7** | To support schools on all enquiries concerning delegated budgets. | |
| **8** | To provide financial management support to schools and school governors. | |
| **9** | To support and assist the team in general finance duties. | |
| **Date Job Description prepared/updated:** | | **March 2024** |
| **Job Description prepared by:** | | **Schools Finance Manager** |

**Person Specification**

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| **Department** | | | **Chief executives** | | |
| **Job Title** | | | **FMS Officer** | | |
| **Stage One** | | | Candidates who are care leavers, have a disability, are ex-armed forces or are a carer (see [Carers-Charter-FINAL.pdf (gmhsc.org.uk)](https://www.gmhsc.org.uk/wp-content/uploads/2018/04/Carers-Charter-FINAL.pdf) are guaranteed an interview if they meet the essential criteria for the role | | |
| **The Minimum Essential Requirements for the above Post are as Follows:** | | | | | **Method of Assessment** |
| **1.** | **Skills and Knowledge** | | | | |
| 1. | Numeracy skills with the ability to interpret and analyse data | | | | Test |
| 2. | The ability to communicate and present detailed financial information to both finance and non-finance individuals/ groups at all levels. | | | | Application Form/Interview |
| 3. | Computer aptitude demonstrated by the ability to produce, evaluate, and interpret data into meaningful information for headteachers and budget holders in a format that is relevant for the intended audience | | | | Application Form/Interview |
| 4. | Must be able to work to deadlines and manage time effectively, whilst demonstrating both team working and working on own initiative. | | | | Application Form/Interview |
| 5. | Knowledge of schools delegated budget responsibilities | | | | Application Form/Interview |
| 6. | The ability to identify and resolve problems relating to financial management in a proactive way and demonstrate a challenging approach to problem solving. | | | | Application Form/Interview |
| 7 | **Competencies** – Please note the council’s corporate competencies, which are essential for all roles, are below in the Core Competencies section | | | | Interview |
| **2. Experience/Qualifications/Training etc** | | | | | |
| 1. | | 5 CSE’s Grades A-C (or equivalent), 2 of which must be Maths and English | | Application//Interview/Certificates | |
| 2. | | A high degree of working knowledge and experience of creating and maintaining spreadsheets to analyse complex financial information. | | Application//Interview/Test | |
| **3. Work Related Circumstances** | | | | | |
| 1. | | All posts require the job holder to undertake mandatory training for the role and to regularly review their developmental needs in conjunction with their line manager. Development of our employees plays a key role in delivering our services | | Interview | |
| 2. | | The Council has a framework of Values & Behaviours that guide our behaviour and decision making to help achieve our vision. All employees are expected to be mindful of these when undertaking their work. | | Interview | |
| 3. | | This role requires the job holder to work outside of normal office hours, for example at evenings and weekends, to meet the needs of the service. | | Interview | |
| 4. | | This post has been designated an essential car user post. You must hold a full, current and valid driving licence and a vehicle with a current valid MOT certificate. You will also need adequate vehicle insurance cover to comply with the council’s requirements, in line with the Travel Costs Reimbursement Policy | | Interview | |

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| **Date Person Specification prepared/updated** | **March 2024** |
| **Person Specification prepared by** | **Schools Finance Manager** |

**These core competencies are considered essential for all roles within Bolton Council. Please be prepared to be assessed on any of these during the interview process and, for the successful applicant, throughout the probationary period.**

**Developing Self & Others**

Promote a learning environment to embed a learning culture.  Support others to develop their skills and knowledge to fulfil their potential. Actively pursue your own development. Support and promote the principles of Investors in People.

**Civil Contingencies**

Bolton Council has a statutory duty under the Civil Contingencies Act to respond in the event of an emergency. If Bolton Council’s Emergency Management Plan is activated, you may be required to assist in maintaining key Council services and supporting the community.  This could require working outside of routine working hours and working from places other than your normal place of work.

**Equality & Diversity**

Uphold the principles of fairness and the Equality Act in all undertakings as a Bolton Council employee, including providing a fair, accessible service irrespective of customer’s race, religion, gender, sexuality, disability or age.

**Customer Care**

The ability to fully understand, assess and resolve the needs of all customers including those who present with complex situations, in a manner that respects dignity and expresses a caring & professional image.

**Health & Safety**

Take responsibility for the health and safety of yourself and others who may be affected by your acts or omissions, and comply with all health and safety legislation, policy and safe working practice, including participating in training activities necessary to your post.

**Data Protection and Confidentiality**

Ensure that any personal data or confidential data you hold is kept securely and is not disclosed, whether electronically, verbally or in writing, to any unauthorised third party. Follow Council policies and procedures on dealing with personal information and information assets, including The Code of Conduct, Data Protection, Acceptable Use and Information Security policies. Personal or confidential data should only be accessed or used for council purposes.

**Fluency Duty**

Should you be required, as a regular and intrinsic part of your role, to speak to members of the public in English, you must be able to converse at ease with customers and provide advice in accurate spoken English, as required byThe Immigration Act 2016.

**Working Hours**

The nature and demands of the role are not always predictable and there will be an expectation that work will be required outside of normal hours from time to time.

**Safeguarding**

This Council is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment. Should the role involve working with the above groups, you will be subject to an Enhanced Disclosure and Barred List check by the Disclosure & Barring Service.

**The values of an organisation are those key principles by which people are expected to work to day to day. They’re our culture and help define what is expected of each and every one of us**.





