



## **JOB DESCRIPTION**

<b>JOB TITLE:</b>	<b>ACCOUNTING TECHNICIAN - SCHOOLS</b>
<b>DIRECTORATE:</b>	<b>TRAFFORD SERVICES FOR EDUCATION (TRANSFORMATION &amp; RESOURCES)</b>
<b>PAY SCALE:</b>	<b>BAND 6</b>
<b>DIRECTLY RESPONSIBLE TO:</b>	<b>SCHOOLS' FINANCE – SERVICE MANAGER</b>
<b>DIRECTLY RESPONSIBLE FOR:</b>	<b>None</b>

### **Main Purpose of the Job:**

**Assisting Head Teachers discharge their financial responsibility for budget and financial management, as defined in the Scheme for Financing Schools, by applying standard practices and procedures. Maintaining data integrity and presenting information to assist Head Teachers, Governors and the Council, and to undertake modelling and analysis as commissioned. To develop and maintain strong and effective client relationships, and to promote value and a positive image of the service.**

### **Specific Duties and Responsibilities:**

1. To work independently in assisting schools in planning, preparation and monitoring of their budgets. Ensuring Heads, schools staff and governors are aware of the Scheme, Formula and general finance procedures in order that schools finances are effectively managed.
2. To provide advice, support and training.
  - On the operation of resource management system in schools
  - To ensure compliance with DfE related matters and initiatives
3. To assist with the delivery of training to schools including development of manuals and guidance in respect of financial policies and procedures.
4. Assist with the preparation and interpretation of financial statements in schools.
5. Produce multi-year budget plans for schools in accordance with financial regulations and DfE requirements.
6. To prepare reports and present explanations of budgetary position for presentation at Governing Body Finance meetings.
7. To be flexible to work at any school that is contracted within the Borough.

### **General Duties and Responsibilities:**

8. Identifying, analysing and resolving data and / or system errors and determining and applying the correct solutions promptly.
9. To have a high level of direct responsibility for the data integrity of financial systems and / or assisting clients discharge their budgetary responsibilities for standard budgets.

### **Standard Requirements:**

10. The post holder will be subject to rotation for posts on the same pay band as required within the Directorate.
11. To attend meetings, seminars, training courses within or outside the Borough as required.
12. To comply with all Council policies, procedures, professional practices and relevant regulation and legislation.

13. To respond to enquiries and requests for information and advice from both internal and external customers, positively promoting the service.
14. To work as part of a team with an ability to work independently within agreed guidelines.
15. To undertake any other duties as required commensurate with the post.

### **Health and Safety**

To operate safely within the workplace with regard to the Council's health and safety policies, procedures and safe working practices. To be responsible for your own Health and Safety and that of other employees.

### **Equalities & Diversity**

To work within the Council's Equalities and Diversity Policy, embracing through personal example, open commitment and clear action that diversity is positively valued, resulting in access for all by ensuring fair treatment in employment, service delivery and external communications.

### **Customer Care**

To continually review, develop and improve systems, processes and services in support of the Council's pursuit of excellence in service delivery. To recognise the value of its people as a resource.

### **Training and Development**

To identify training and development needs with your manager, taking an active part in your Personal Development and Review Plan. To access development opportunities as they arise and share learning with others and where appropriate, actively encourage a learning environment and development within others.

### **Policy**

To work at all times within the established policies and practices of the Council, within the framework established by the Council Constitution and associated guidance.

### **Confidentiality**

To adhere to the Council's policies and procedures on confidentiality and the management and sharing of information.

## **PERSON SPECIFICATION**

**JOB TITLE: ACCOUNTING TECHNICIAN - SCHOOLS**

**DIRECTORATE: TRANSFORMATION & RESOURCES**

**PAY SCALE: BAND 6**

**STAGE ONE: Disabled candidates are guaranteed an interview if they meet the essential criteria**

<b><i>MINIMUM ESSENTIAL REQUIREMENTS</i></b>	<b>METHOD OF ASSESSMENT *</b>
<b>1. Qualifications/Training etc</b>	
Good numeracy and Information Technology skills, GCSE passes in Mathematics & English Language, and ECDL (or equivalent).	C/A
AAT or part-qualified CCAB (diploma level) or equivalent in terms of experience, <b>and schools experience</b> .	C/A
Evidence of continued professional development.	C/A
<b>2. Experience</b>	
Experience of working in a finance function of a large, complex organisation such as a school or Council based Schools Finance Team.	A/I
Direct experience of assisting non finance managers such as Head Teachers and Office Managers establish, monitor control and close their budgets.	A/I
Experience of working in a team, and achieving collective goals.	A/I
Experience of using ledger systems.	A/I
Experience of writing short reports on financial facts that clearly identify the potential impact(s) or consequence(s) on the business.	A/I
Experience of quickly analysing complex problems and finding appropriate and timely solutions.	A/I
Experience of demonstrating, guiding or advising on standard procedures and processes.	A/I
Experience of working with school financial systems.	A/I

<b>MINIMUM ESSENTIAL REQUIREMENTS</b>	<b>METHOD OF ASSESSMENT *</b>
<b>3. Knowledge</b>	
An understanding of the funding and financial management of schools, including their information systems.	A/I
A broad understanding of the legislation and funding arrangements relevant to Local Government.	A/I
<b>4. Skills &amp; Abilities</b>	
Ability to communicate effectively with headteachers, schools staff and governors and/or the public both verbally or in writing, selecting and using appropriate media.	A/I
Ability to present financial data and/or information in a format easily understood by managers of a non-finance background.	A/I
Self-motivated with ability to prioritise and manage your workload over extended periods, producing accurate work within deadlines and with minimal supervision.	A/I
Ability to quickly identify existing or potential business problems with significant financial consequences and either take or present short to medium term solutions.	A/I
Ability to support the design or adaptation of business systems so that they are fit for purpose and cost effective.	A/I
Ability to establish and maintain excellent working relationships with colleagues, Head teachers, Office Managers and Governors.	A/I
Ability to use 'office application software' to maximise your efficiency and effectiveness.	A/I
Ability to provide training to small groups of heads, schools staff and governors on the application of schools standard accounting and business processes, DFE funding regulations and procedures.	A/I

**STAGE TWO: Will only be used in the event of a large number of applicants meeting the minimum essential requirements**

<b>ADDITIONAL REQUIREMENTS</b>	<b>METHOD OF ASSESSMENT *</b>
<b>1. Qualifications/Training etc.</b>	
Other business, accounting or ICT qualifications at NVQ3 or higher, or equivalent.	C/A
Training qualifications or equivalent.	C/A
Advanced courses in spreadsheets, preferably Excel, and/or visual basic programming language.	C/A
Advanced training in the use of SAP financial software.	C/A
<b>2. Experience</b>	
Experience of working in a finance function within Schools.	A/I
Direct experience of assisting Head Teachers establish, monitor, control and close their budgets.	A/I
Experience of Schools' information management software (SIMS).	A/I
Experience of SAP financial systems.	A/I
Experience of providing training to small groups on the application of standard business and accounting processes and procedures.	A/I
<b>3. Knowledge</b>	
A detailed understanding of the funding and financial management of schools, including their information systems.	A/I
A detailed understanding of the current and future legislation and funding arrangements affecting Local Government.	A/I

**\* Method of Assessment**

A = Application form, C = Certificate, E = Exercise, I = Interview,  
P = Presentation, T = Test, AC = Assessment centre

Date prepared/revised: 21<sup>st</sup> January 2015.