Role profile

**Schools Financial Advisor**

**Our values:**

**We are dedicated, respectful, collaborative. We are Milton Keynes City Council.**

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| **Service** | Finance |
| **Reports to** | Schools Funding Accountant |
| **Job family** | Professional and Technical |
| **Grade**  | F |
| **Political restricted?** | N |
| **DBS required?** | N |
| **Date**  | May 2025 |
| **JE Code** | JE2200 |

Key deliverables

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| **1** | To work with schools ensuring that they are informed of their budget allocation and collating budget plans in a timely manner. Provide templates for schools to complete which allows a clear and efficient process.  |
| **2** | To manage the cash advance and VAT payments to schools, ensuring that payments are accurate, all queries are resolved efficiently, reconciliations are completed, and information is shared with schools. |
| **3** | To work with schools and finance colleagues on the preparation of year-end adjustments, ensuring all entries into the accounts and supporting working papers are accurate and evidenced. Liaise and respond to internal and external audit as required. |
| **4** | To provide financial advice and support to schools identified as high risk and ensure our Local Management of Schools guidance is regularly updated and reviewed |
| **5** | To manage the banking arrangements for all maintained schools ensuring that applications, change requests and procurement cards are processed efficiently. |
| **6** | To co-ordinate and review the monthly, quarterly and annual returns from schools in line with the deadlines. Ensure that returns are challenged and completed accurately.  |
| **7** | To regularly reconcile grant income and ensure it is correctly allocated on our finance system |

*Within reason these key deliverables may evolve to meet service need and it is expected that you will be flexible and adaptable in your delivery to meet both service and city council wide needs*

**Essential requirements** Key skills, expertise, and qualifications

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| **1** | Part qualified (AAT or equivalent). |
| **2** | Experience of working in a finance environment, preferably schools finance. |
| **3** | Have excellent written and oral communication skills. |
| **4** | Experience of using IT systems (excel, word) and financial software packages. |
| **5** | Ability to work as part of a team and on own initiative. |

Job family

**Professional and Technical (Grade F)**

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| **Colleague expectations*** Be professional at all times
* Work together for the good of the team, city council and local people
* Promote a supportive culture
* Challenge assumptions
* Take ownership
* Be willing to change and do things differently
* Always work in a safe manner
 | **Manager expectations*** Be a role model by displaying positive behaviours at all times
* Make well-considered decisions
* Support, coach and communicate with my team
* Be accountable for my team’s performance
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Professional and Technical job holders rely upon their deep knowledge of the specialism or discipline in which they work to carry out vital tasks and provide authoritative advice to others. Often developing within recognised career paths, their evolving expertise sees them bear increasing responsibility for managing city council assets, the development of policies and procedures and the strategic direction of the functions they support.

This element of the profile, taken from the job family descriptor for this grade, provides a general understanding of the level of work and demands required.

**Role characteristics**

At this level with dedicated specialist qualifications or an equivalent level of direct experience in their particular field, job holders deal autonomously with complex issues, analysing and forming judgements about not only their own technical or professional specialism, but also the attendant resource, finance, planning and similar issues that combine to challenge the job holder.

**The knowledge and skills required**

The range of knowledge required for these roles includes an understanding of the policies and procedures across the specialist area in which job holders work, as well as a solid underpinning of technical knowledge gained through dedicated formal education.

Job holders will have been working within the specific field for a reasonable time, such that they have been exposed to many of the routine and more unexpected circumstances of their role.

While the majority of roles will have demands for manual dexterity in relation to typing and similar functions, jobs will use a range of equipment requiring precision in their use and handling.

**Thinking, planning and communication**

The situations and problems dealt with at this level will be increasingly complex, involving several information streams where analytical and judgemental skills will be needed to interpret information correctly and determine optimum solutions.

Job holders will have plenty of day-to-day issues to contend with, they will also need to plan some months ahead to achieve medium term objectives in such areas as project support or service development.

At this level, the information exchanged with internal and external colleagues, and members of the public will call for developed communication skills on the part of the job holders. Matters will be technically complicated, requiring careful explanation, or sensitive, requiring significant listening skills to interpret information and provide appropriate advice.

**Decision making and innovation**

Job holders will have the autonomy to adapt specific approaches to better meet medium term objectives. They will be bound by the recognised procedural framework of their specialism as it is managed by the city council but will decide when and precisely how duties are to be carried out. They will also deal with problems (often escalated to this level) for which there are no set-down routes to a solution other than broad service practice guidelines.

**Areas of responsibility**

With a diverse range of jobs being represented at this level, the precise blend of responsibilities for which the job holder is accountable will depend upon the service in which they operate.

External facing roles will focus on the needs of people whether external service users or partners and will be responsible for high impact decision making and the implementation of appropriate programmes on behalf of individuals or groups of people or enforcement of regulations which have direct and significant consequences upon those served. Such roles are likely to have only modest levels of responsibility for finance, information assets, equipment and/or premises.

Internal roles are likely to have this pattern reversed, with weightier responsibility for significant financial and non-financial assets, but less for the assessment of needs of individuals and groups.

Jobs will have supervisory responsibility for the work of others and will be accountable for the quality and timeliness of outputs, whether related to the work of internal teams or temporary external contractors, volunteers or others.

**Impacts and demands**

Tasks and duties will be generally carried out in a sedentary position but there will always be a requirement for standing and walking from time to time, and the occasional need to lift or carry items.

The problem solving and decision-making elements of these jobs mean that job holders require lengthy periods of enhanced mental attention to attend to duties, while also dealing with deadlines, interruptions and conflicting demands.

Duties of jobs at this level will not require job holders to develop and maintain working relationships with people who, through their circumstances or behaviour, place particular emotional demands on the job holder.

Job holders find themselves exposed to some disagreeable, unpleasant or hazardous working conditions. Particularly when the needs of their specialism require them to work on external sites exposed to the weather, in or around refuse and waste plant, close to particularly noisy machinery and in similar environments.

Other Professional and Technical jobs, such as enforcement roles, may also see job holders exposed to verbal abuse and threatening environments. In all cases, job holders will minimise risk and conform to health and safety regulations to mitigate any negative effects of such exposure.