

Role profile

Job Title:	School Bursarial and Resources Strategic Lead	Grade:	14
Department:	Planning, Resources and Service Development	Post no.:	64957
Directorate:	Childrens Services	Location:	Perceval House

Role reports to:	Head of Education Planning, Resources and Sustainability
Direct reports:	4 x Schools Bursarial Service Senior Support Officers Scale 12 P003210, P003211, P003207, P003218
Indirect reports:	Responsible for supervising any administrative and project support providers and external consultants/contractors

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

- To manage a sustainable, evolving School Bursarial Service that delivers strategic, operational and complex financial management advice, support and training to head teachers, governors, school business managers, bursars, finance officers and school administrators of 60+ schools on a buyback arrangement.
- To play a major role in supporting schools financial sustainability, including monitoring and risk management for school leaders and governors across all Local Authority maintained schools in Ealing with over £300m in budget pa.
- To play a major role in the planning, co-ordination and strategic development of the Dedicated Schools Grant (£450m+) for schools, High Needs and Early Years, devolved to schools and centrally retained.

Key accountabilities

- Be responsible for the development and short, medium, and long term sustainability of the School Bursarial buyback service which fully covers its costs and generates an agreed surplus income in a climate of national regulatory and legislative change.

- Achieve an agreed take up of the services by schools (staffing levels relate to the take up of the service by schools).
- Provide innovative solutions to improve the efficiency, take up, and value added functions of the School Bursarial Service, including by developing alternative ways to raise income by selling additional services to schools
- Maintain front line a caseload of schools, delivering strategic, operational and complex financial management advice, support and training to school staff at all level where required
- Ensure that the service delivers the customer's requirements by being innovative and flexible.
- 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
- Support the Head of Service in delivering operational aspects of School funding reform, and legislative transformation in terms of the bursarial service and its impact on schools.
- Be the primary service point of contact for oversight, advising, influencing and quality assuring the operational management of the Schools Accountancy Service.
- Performance manage the direct reports by undertaking recruitment, appraisals, 1;1's, team briefings, return to work interviews, disciplinary & competency interviews, offering guidance and instruction as appropriate.
- Develop, in consultation with colleagues in Accountancy, Audit and schools, cost effective and safer systems of financial management, which safeguard the public funds involved (all maintained schools spend £300M+ annually)
- Keep abreast of legislation and national and local practices, procedures, initiatives and advise schools accordingly.
- Provide consultancy and practical support to schools who have received poor audit reports as directed by the Head of Service or Assistant Director.
- Manage, monitor and ensure high professional standards of practice and performance in all areas of service delivery by leading by example.
- Support the Head of Service on the co-ordination of consultation and communication plans and related activities across schools finance and processes covering internal and external stakeholder interests.
- Lead on business planning for the service, which needs to deliver on the Council's Key Priorities.
- Maintain a high level of technical expertise in financial software used in schools
- Ensure that those schools that buy into the school bursarial service have access to an up to date version of the service's budget planner in time for budget setting
- Develop 3 year medium term financial strategy tools and templates.

- Support schools in meeting the councils and DfE requirements with regards to year end, budget setting, CFR & budget monitoring
- Produce and maintain the annual SLA, marketing information and communications, and manage negotiations with head teachers and Governing bodies around buy back service levels and bespoke packages
- Manage and support with projects, including to deliver training programmes and develop the use of software solutions to budget monitoring and management.
- Support maintained schools to set sustainable revenue budgets for the next three years.
- Support school financial sustainability and deficit recovery, including monitoring and risk management for school leaders and governors across all Local Authority maintained schools in Ealing and deficit recovery planning.
- Contribute to producing the annual scheme for financing schools
- Influence change to LA practice to provide benefits to schools in terms of efficiency and management of resources.
- Play a major role in the planning, co-ordination and strategic development of the Dedicated Schools Grant funding formulas for schools, High Needs and Early Years, devolved to schools and centrally retained. This will include budget modelling, forecasting, making finance recommendations and communicating key changes to senior management and schools.
- Play a lead role in writing the annual school and early years funding consultations and quarterly school forum reports.
- Work with the head of service and Assistant Director on schools forum reporting, relationship management and decision making processes.
- Be responsible for representing the local authority at high level meetings with appropriate Government Departments, Local Authority Associations and other local authorities
- Undertake other duties and responsibilities of a similar nature or at a similar level of responsibility on an ad hoc basis.

Key performance indicators

- To cover the cost of the service, and generate an agreed surplus.
- To achieve an agreed take-up of the service
- To keep customer complaints below an agreed amount

Key relationships (internal and external)

- Head of Education Planning, Resources and Sustainability
- AD Planning Resources and Service Development
- Corporate Board, Directors and other senior officers across the Council

- Schools (Governors, Heads, Senior Leadership Teams, School Business Managers)
- Audit & Investigation
- Ealing Learning Partnership
- External consultants and contractors
- Suppliers (e.g. of school financial systems)
- Schools Accountancy
- HR and Payroll Providers
- DFE and Education Funding Agency
- Local Government Associations
- Education Property, including Health & safety and PFI Team (Private Finance Initiative)

Authority level

- Performance management and leadership of School Bursarial Service
- Manage Schools Bursarial Senior Support Officers (currently 4 people)
- Create, review and update policies for School Bursarial Staff and School Staff
- Budget holder (School Bursarial Service) of £300k+
- Contribute to the effective management of and strategic development of Dedicated Schools Grant (£450m+) and other schools funding streams in schools.

Person specification

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Essential knowledge, skills and abilities

1. High standard of communication skills, demonstrated by the ability to write reports and correspondence; to compile complex information into detailed reports, and to communicate and present to internal and external audiences at all levels.
2. Advanced IT skills including advanced knowledge and proficiency in spreadsheet software such as MS Excel and the ability to support schools in the effective use and operation of computerised management information and financial systems.
3. High standard of budget management skills, demonstrated by the ability to draft and monitor budgets; to compile information into simple factual financial reports for managers and to assist schools in the planning, setting and monitoring of budgets.

4. Ability to provide effective advice and support to school leaders and staff at all levels to ensure compliance with legislation, statutory guidance and to promote financial best practice.
5. Ability to deliver training on an individual and group basis at all levels and to identify, evaluate, recommend and implement new and innovative approaches to training for both school based staff and the Bursarial team.
6. Ability to manage change within a customer care framework, effectively organise a range of diverse functions with differing priorities and demonstrate creativity and innovation in their delivery.
7. Ability to develop, use and maintain appropriate project management systems and work within project management principles.
8. Ability to manage and support staff to ensure effective and consistent service delivery, including managing staff recruitment, induction, supervision, performance appraisal, personal development and dealing with poor performance.
9. Detailed knowledge and understanding of school organisations and structures and legislation, regulations and statutory requirements in relation to financial management and administration in schools.

Essential qualification(s) and experience

1. A degree or other relevant professional qualification and/or equivalent experience in a relevant professional discipline.
2. Qualified or part qualified ACA (e.g. ACCA, CIPFA, CIMA) or Diploma of School Business Management level 4 or above. Or Equivalent experience.
3. At least 3 years experience of working in Schools or Local Authorities in a school support role
4. Experience of dealing with financial management within accounting principles and procedures
5. Relevant experience of working independently and as part of a team, including of managing staff, to deliver successful outcomes for projects in a demanding environment with changing priorities and deadlines.

Values and behaviours

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