

## Job description

**Job title:** Finance Consultant

**Reports to:** Finance & Business Manager

---

### About School Business Services

SBS are one of the UK's leading suppliers of education support services with a portfolio that includes the full spectrum of ICT, Finance, MIS and HR & Payroll offerings. Professional teams that have a wealth of experience and an excellent reputation within the education arena manage our services.

---

### Principal Job Role

To provide high quality financial and system advice to our customers. The post holder will be part of a highly professional team, working independently in a variety of schools with an expectation to use their own initiative. There will be an expectation to perform this role within maintained, academy or free schools.

### Duties & Responsibilities

1. Provide advice and guidance to schools on setting, managing and monitoring their budgets.
2. You will be required to keep up to date with current changes in education finance and legislation and communicate this when providing advice and guidance.
3. Schedule contract days for all schools and input data onto internal CRM system against the contracts.
4. Meet with the Business Manager/Headteacher as required to discuss priorities and update systems accordingly.
5. Work with the school to prepare 3-5 year budgets. This may include scenario planning.
6. Troubleshooting on finance systems and external returns to LA/ESFA as needed to support school staff. Data interrogation to identify mispostings and inaccurate data processing etc.
7. Guide and direct school staff to be organised in their financial processes and record keeping.
8. Complete SBS checklist of tasks to allow budget monitoring to be accurate.
9. Prepare management reports for circulation.
10. Use the company's budget planning software as and when required for planning and monitoring.
11. Maintain a working knowledge of computerised financial systems, including RM, FMS, PS Financials, Civica and other accounting systems in operation within the school environment and attend any relevant training.
12. Support schools in preparation for audit, ensuring compliance prior to auditor's visits on site. Attendance on site may be required during this time.
13. Provide interim finance support to schools as and when required.
14. Handle any school complaints in a professional manner following company policy. Provide appropriate feedback to Line Manager at all times.
15. Maintain accurate records ensuring that all information relating to schools is kept confidential and filed appropriately at SBS in the cloud systems provided.

16. Ensure information is communicated to your Line Manager for any additional billable work undertaken.
17. Identify new opportunities and be aware of all company services offered that could be relevant to the schools you support.
18. Provide support and advice to other team members as required.
19. Attend and contribute to all team/office meetings.
20. Maintain level of personal skills and knowledge through CPD.

**Any additional duties commensurate with the post as specified by your Line Manager**