

# Keystone Knowledge Recruitment Pack

## Financial Account Manager (Consultant) September 2024



## Welcome to Keystone Knowledge

Thank you for your interest in this role. We're really excited about what we do, and the impact that we're having in the schools that we work with, right across the country.

Keystone is a small but rapidly growing business that exists to provide great support to schools and multi-academy trusts. We have a strong vision for our direction of travel and aim to raise standards of multi-academy trust support service education. This is ambitious, exciting, and challenging. We have made a brilliant start; our team are dedicated and receive incredible testimonials from our clients. But, we're not done yet, and we are looking for our new colleague to come and join with us to support some amazing projects, and provide high quality support to the schools that we work with

Keystone was established in 2020 to build upon my belief that all children in our schools deserve the very best. And whilst not everyone in a school is a teacher, everyone in a school does contribute to making sure that each day is an enriching, engaging and inspiring experience. Somewhere, in one of our schools is a future prime minister, a rocket scientist, someone that will cure cancer, and everyone will leave a lasting impact on numerous people as yet untold. We owe it to them to give them the best education we possibly can.

That's where you might come in. By being part of the team, you will play an integral part in helping schools understand their finances, - a crucial part in enabling them to deliver brilliant education to the children in their care. We're looking for someone who doesn't just see their work as a task, but sees the end result that their work can have, and works to deliver the best outcomes. This is a fairly autonomous management accountant role, needing to be agile working across several clients, and be able to 'do the numbers', as well as the reporting. You won't be afraid to roll your sleeves, up, and you'll find the challenge of getting accounts right hugely rewarding.

Recruitment works both ways, and it is important we let you know what it will be like working with me and the rest of the team. We will let you flourish, with very high levels of professional autonomy. We will hold true to our values and practices, not sweat the small stuff and keep our eye on what we're trying to achieve, and we often use humour to lighten the pressure. I am incredibly ambitious for Keystone but listen carefully to others. I believe how we do things counts as much as what we do.

If this incredible opportunity interests you, and if you believe you have the skills and passion to succeed in this role, then we would love to hear from you. Details of how to apply are given at the end of this recruitment pack. I very much look forward to receiving your application.

**Stephen Mitchell – CEO**

[hello@keystoneknowledge.com](mailto:hello@keystoneknowledge.com)



## What we do

At Keystone Knowledge, we work with schools and trusts on an operational and strategic level. We are passionate about the importance of good education and supporting school leaders to improve on industry standards and bring school operations and teaching practice together to create truly great schools. We work in areas such as finance, internal scrutiny, HR and trust growth to assist senior leaders and school business management with solutions that ultimately facilitate better outcomes for students and pupils. Our client-facing team are school people with experience working in education sector roles, so they have direct knowledge and awareness of the issues that schools and trusts face on a daily basis.

## Why Join us?

Here at Keystone we are keen to use our skills and expertise to improve the outcomes for students and give them the best possible future. Although it may seem like a lofty ideal, we can make a difference by working shoulder-to-shoulder with schools. No matter if you are part of the client-focused team or the operational support functions, everyone within Keystone Knowledge is forming part of our art of the possible.

### **We are a friendly bunch, and we also offer some nice perks.**

- ✓ A friendly, people focused environment with great values
- ✓ Sector competitive pay and terms of employment
- ✓ Contributory pension scheme
- ✓ Flexible working arrangements
- ✓ Working from home arrangements
- ✓ Generous holiday pay scheme, including 25 days paid leave, bank holidays and bonus Christmas to New year closedown
- ✓ Director's discretionary bonus
- ✓ Access to Discounts at 100's of retailers and service providers through PerkBox™
- ✓ Employee Assistance programme, supporting mental and physical health
- ✓ Your birthday or other celebration day as an additional day's paid leave
- ✓ Carbon offsetting
- ✓ Free access to a financial advisor

## About you

We care much more about getting the right person to work with us, than what paper qualifications you may have. However, it is likely that the right person will have:

- ✓ Several years of good finance experience at management accountant level
- ✓ Aptitude to find solutions
- ✓ A keen eye for detail to successfully scrutinise data
- ✓ Be experienced with a range of finance systems
- ✓ Ability to stay calm in a busy work environment.
- ✓ Ability to multi-task and work across several clients
- ✓ Ideally, experience of school finance

## Job Profile

<b>Role title</b>	Finance Account Manager
<b>Department</b>	Finance
<b>Salary</b>	£42,000 to £45,000 Per annum FTE equivalent
<b>FTE</b>	37 hours per week Full-time/ Flexible working discussion welcomed
<b>Location</b>	Hybrid working between client school offices and work from home. (The ability to travel to client schools is required)
<b>Reporting to</b>	Executive Team
<b>Responsible for</b>	N/A

### Core Purpose

To ensure that the role is carried out in a way that reflects the vision and values of Keystone Knowledge. Observing company policy, practice, and procedures.

This role works across several schools and academies with each individual client having different requirements and we are looking for someone that can adapt their style to suit, whilst maintaining a

professional and friendly approach, and bring a solution focused, proactive focus to ensure that the client receives amazing service and feels well supported.

To contribute to a culture of a personal approach and vision to creating outstanding education

### **Role-specific responsibilities:**

- To support client schools by providing financial management support on a bespoke basis across a wide variety of areas
- To oversee and manage the daily financial record keeping for the client stakeholders
- To provide strategic advice and guidance to school leaders on financial efficiency and effectiveness, in liaison with colleagues
- Support school leaders with strategic and financial planning
- Prepare budgets for short, medium and long term scenarios
- Produce management accounts and other management information as required
- Prepare reports for Governors / Trustees
- Prepare draft budgets in consultation with school leaders
- Prepare statutory returns as appropriate
- Support Internal Scrutiny work undertaken at clients
- Analyse efficiency of school operations and make recommendations
- Development of knowledge through working on other operations areas with colleagues to support schools

### **Consulting Responsibilities:**

- Traveling to and from client bases as per agreed contract.
- Learning and maintaining knowledge across several different software platforms.
- Maintaining clear professional communication with one or more clients at a time.
- Supporting generalised finance for clients where the needs of the contract are required.
- Remain adaptive to the client's needs and situation, working in larger and smaller trusts with varying levels of team support.
- Participating in onboarding new finance interim contracts and project work with clients.
- Provide regular reporting and update the internal client project management system to support the client account manager with client relationships.

**General responsibilities:**

- To uptake carry out any other duties as reasonably requested.
- Work in accordance with our policies and champion our vision and values, maintaining the company's reputation.
- Observe the health and safety policies and procedures.
- Invest time in your own development; attend training, undertake personal research and identify opportunities for your continued personal development.
- Recognise that Keystone is a growing business and undertake all reasonable requests in line with your position.
- Work to the highest standards of corporate and social responsibility.
- Be committed to our ethics and values in relation to equality, diversity and inclusion.

## Person specification

Role Title                      Finance Account Manager  
 Department                    Operations

Assessed by  
 application (A)  
 or at interview  
 (I)

### Attainment and Qualifications

#### Essential

Relevant accounting or finance qualification or experience                      A/I

#### Experience

##### Essential

Experience providing support at finance management level                      A/I

Experience of a range of finance software systems                      A/I

Experience in working with senior managers and other key stakeholders internally and externally                      A/I

Experience in providing recommendations for changes to ensure budget adherence.                      A/I

##### Desirable

Experience in managing MAT/ SAT and maintained schools financial records                      A/I

Experience in developing budgets and financial forecasts                      A/I

### Skills and Knowledge

#### Essential

To demonstrate a sound knowledge of the Academy Trust Handbook                      A/I

Ability to set and work to agreed targets include audit and management account deadline

Good organisation and personnel management skills                      A/I

To demonstrate problem-solving and analysis skills                      A/I

#### Desirable

Knowledge and understanding of the education sector and in consultancy-based work                      A/I

### Personal Disposition

Adaptable multitasker

Highly organised and solution-focused

Conscientious approach to working.

### Other

Ability to obtain a successful DBS check (carried out by Keystone)                      I

Full UK Driving license and access to own vehicle

## How to Apply

We currently advertise our open positions on LinkedIn™ and via our website: [www.keystoneknowledge.com](http://www.keystoneknowledge.com). We welcome enquiries related to the job. To apply, please submit a cover letter no longer than two pages of A4 along with your complete CV to [HR@keystoneknowledge.com](mailto:HR@keystoneknowledge.com). Your cover letter should explain why you are interested in this position and what skills you can bring to Keystone Knowledge.

While we strive to provide feedback to all applicants, depending on the number of applications received, there may be other options. If you are still waiting to hear from us within four weeks after the application deadline, please assume your application has not succeeded. Please note that we reserve the right to close the position earlier than the deadline if we receive sufficient suitable applications.



Contact us:

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