



Job Title: Administration / Finance Assistant Job Description

Grade: 6

Hours of Work:

Post Number:

Responsible To: *(Line Manager job title required)*

Responsible For: *(add any direct reports)*

**Key Relationships/
Liaison with:**

Job Purpose: To have responsibility for general day-to-day administration tasks and financial support, prioritising your own work to provide a confidential, effective, efficient and flexible service for the school.

Occupational Standards: Business and Administration Level 2-3

MAIN DUTIES AND RESPONSIBILITIES:

1. To provide a courteous reception and visitor management service, responding directly to the majority of enquiries, and ensuring that visitors are welcomed and managed in accordance with established health and safety / child protection procedures.
2. To make and receive telephone calls as necessary in order to fulfil your duties, being mindful of data protection and safeguarding requirements at all times.
3. To undertake post duties, including collecting, opening, sorting and distributing incoming post, and enveloping and dispatching outgoing post.
4. To monitor and maintain the school e-mail account on a daily basis, responding directly to routine enquiries, filtering marketing information and/or forwarding e-mails to the appropriate person.
5. To prepare and distribute information / documentation to the school community as appropriate, including the use of school-home communication systems.
6. To respond to correspondence as appropriate, making use of standardised and non-standardised information.
7. To file documentation accurately within the school's existing filing system, and to set up annual filing systems for documentation produced in the fulfilment of your own duties.
8. To arrange and service meetings / training events when requested, including making room bookings, inviting delegates, arranging refreshments, assembling delegate packs and taking notes of informal meetings if required.
9. To assist teachers in planning and organising school trips, researching venues, obtaining quotes and making bookings in accordance with the teacher's requirements.

10. To use standard office software (e.g. Word, Excel, Powerpoint) and equipment to prepare and produce a range of documents from basic instructions, making use of templates where appropriate.
11. To monitor and maintain appropriate levels of stationery and general curriculum stock items, preparing orders for authorisation.
12. To check deliveries to the school against the delivery note / order, noting any discrepancies and reporting them to the supplier in a timely manner.
13. To prepare and manage pupil lists / groups for a range of purposes (e.g. free school meals, pupil premium, SEN, etc)
14. To process manual records, checking them for completeness and accuracy, applying coding where necessary and resolving any queries or errors. Where required, input the information onto computer systems and utilise these systems to interrogate information and produce non-complex reports.
15. To monitor pupil attendance and punctuality, making appropriate checks on missing pupils ensuring that attendance records are accurate and up to date, and informing the appropriate person if a pupil's attendance or punctuality falls below pre-determined thresholds.
16. To provide information regarding school meal numbers to the catering staff, on a daily basis for hot meals and within agreed timescales where packed lunches are going to be required for school trips.
17. To undertake routine cash handling duties, including receiving and recording payments for school meals and trips, issuing receipts and preparing for banking.
18. To pursue outstanding payments for school meals and trips in a timely manner using standardised letters, and inform the appropriate person if payment is still not received.
19. To process applications for DBS checks, verifying appropriate documentation in accordance with prescribed procedures, recording DBS certificate details in the Single Central record and informing the Head Teacher promptly in the event that any certificate contains disclosures of any kind.
20. Any other duties, commensurate with the grade, for which the post holder has appropriate skills / training, as may be required from time to time.

SPECIAL FACTORS:

Subject to the duration of the need, the special conditions given below apply :

- (a) The nature of the work may involve the post holder carrying out work outside of normal working hours.
- (b) The postholder may be required to attend, from time to time, training courses, conferences, seminars or other meetings as required by his/her own training needs and the needs of the school.
- (c) Expenses will be paid in accordance with the Local Conditions of Service.
- (d) This post is eligible for a DBS check under the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (i.e. it involves certain activities in relation to children and/or adults) and defined as regulated activity under Part 1 of the Safeguarding Vulnerable Groups Act 2006 before the coming into force of section 64 of the Protection of Freedoms Act 2012 on 10th September 2012. Therefore **a DBS enhanced check is an essential requirement.**



This job description sets out the duties and responsibilities of the post at the time when it was drawn up. Such duties and responsibilities may vary from time to time without changing the general character of the duties or the level of responsibility entailed. Such variations are a common occurrence and cannot themselves justify a reconsideration of the grading of the post.

Discovery is seeking to promote the employment of disabled people and will make any adjustments considered reasonable to the above duties under the terms of the Equality Act 2010 to accommodate a suitable disabled candidate.

Job Title: Administration / Finance Assistant Person Spec

Grade: 6

Post Number:

| | Essential | Desirable | How assessed |
|---|------------|------------|---|
| <u>Qualifications</u> <ul style="list-style-type: none"> Level 2 qualifications in maths/numeracy and English/literacy. | ✓ | | App/Doc |
| <u>Experience</u> <ul style="list-style-type: none"> Experience of working in a busy office environment. Experience of working in a school office Experience of cash handling within the workplace. | ✓ ✓ | ✓ | App/Int/Ref App/Int/Ref App/Int/Ref |
| <u>Knowledge</u> <ul style="list-style-type: none"> Understanding of the importance of confidentiality and an appreciation of the implications of the Data Protection Act. Understanding of the context in which schools operate An understanding of health and safety issues relevant to the post. | ✓ | ✓ ✓ | App/Int/Test App/Int/Test App/Int |
| <u>Skills/Attributes</u> <ul style="list-style-type: none"> Confident in the use of a range ICT software packages (e.g. MS Office including Teams, Word, Excel, Powerpoint) and databases. Good communication skills, both oral and written. | ✓ ✓ | | App/Int/Test App/Int App/Int/Test |

| | Essential | Desirable | How assessed |
|--|-----------|-----------|--------------|
| <ul style="list-style-type: none"> • Good time management skills and the ability to manage own workload, to complete daily / weekly / monthly tasks. | ✓ | | App/Int/Test |
| <ul style="list-style-type: none"> • Excellent organisational and inter-personal skills. | ✓ | | App/Int/Ref |
| <ul style="list-style-type: none"> • Able to operate effectively as a part of a team and with minimum supervision | ✓ | | Int |
| <ul style="list-style-type: none"> • Ability to relate well to children and adults in a variety of situations. | ✓ | | App/Int |
| <ul style="list-style-type: none"> • Ability to deal with others in an assertive manner when necessary | | | |
| <u>General Circumstances</u> <ul style="list-style-type: none"> • Evidence of regular attendance at work | ✓ | | Ref |
| <ul style="list-style-type: none"> • An understanding of, and commitment to, Equal Opportunities, and the ability to apply this in day-to-day situations. | ✓ | | App/Int |
| <ul style="list-style-type: none"> • Willingness to undertake training. | ✓ | | App/Int |
| <u>Factors not already covered</u> <ul style="list-style-type: none"> • Must be able to perform all duties and tasks, with reasonable adjustment where appropriate, in accordance with the provisions of the Equality Act 2010 | ✓ | | App/Int/Med |

App = Application Form

Test = Test

Int = Interview

Pre = Presentation

Med = Medical Questionnaire

Doc = Documentary Evidence (E.g., Certificates)