

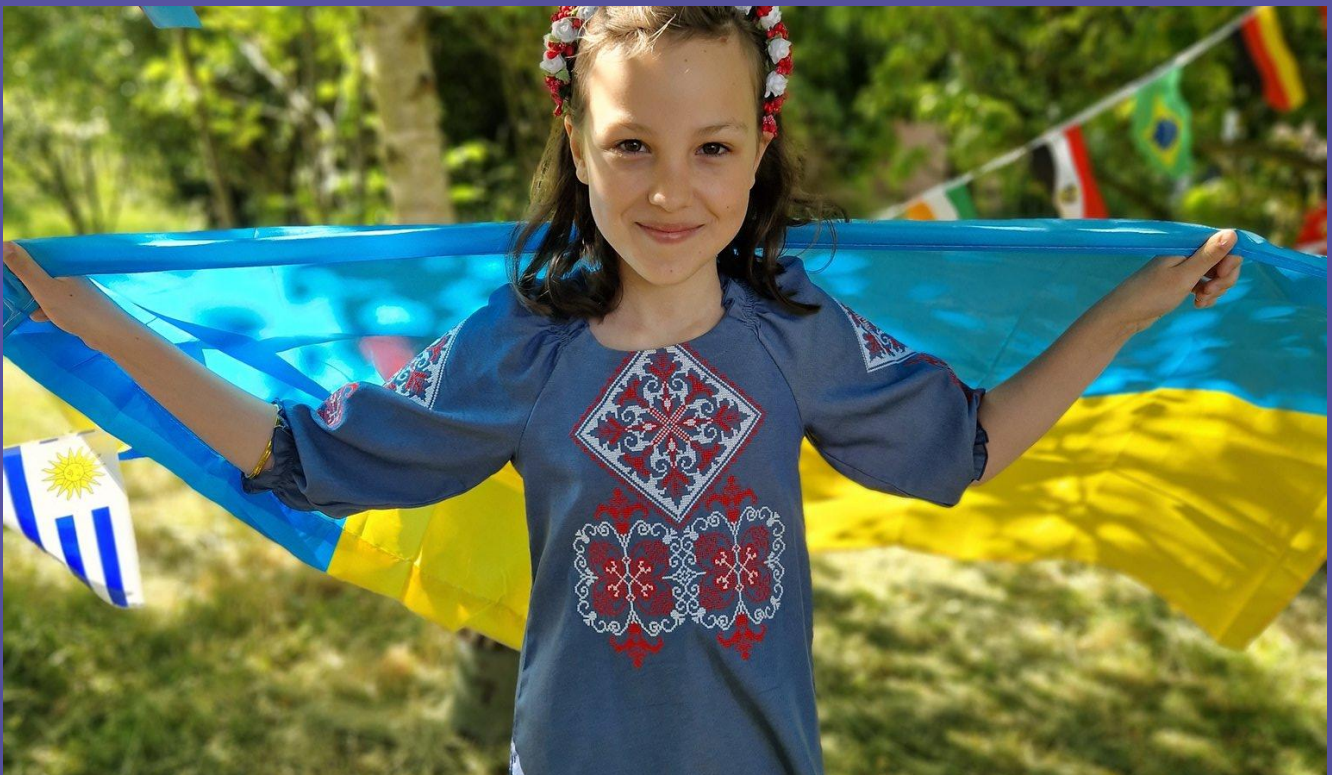
ASSET
Education



Nurturing Humanity

Finance Assistant

Recruitment Pack



MAT EXCELLENCE
AWARDS

WINNER 2024



Wellbeing trust of the year

Presented by  OPTIMUS EDUCATION

About ASSET Education

ASSET is an Education Trust comprising 16 primary schools in and around Ipswich and north-east Suffolk. ASSET is a very special trust and, from the very beginning, we have wanted to tackle social injustice and inequality in education, giving every child the opportunity to be successful and fulfilled in their lives. Our children are our future and we want them to be the best they can be, to have confidence and a sense of service, to be empowered to make our world a more compassionate and sustainable place.

Our people are at the heart of what we do; we support one another valuing connections and relationships because we believe that when people are cared for, learning happens and humans flourish. The Complete Human Strategy looks at 6 dimensions of working life and gives staff a structured approach to collectively and individually influence their work environment and access the support they need.

We support everyone in the Trust to enjoy success, happiness, confidence and fulfilment, and to have excellent physical and mental health. Our CHS framework provides us with a practical pathway to achieving this, and is based on the 6 fundamental pillars of wellbeing.

-  **Structure & Stability**
-  **Expertise**
-  **Positivity**
-  **Relationships & Communication**
-  **Place**
-  **Time Well Spent**



Sarah Orves, Director of Wellbeing

“Our unique model not only improves wellbeing for adults and children, but also provides a step-by-step toolkit to implement in any school, workplace or social setting”

  **Complete**
  **Human**
  **Strategy**
The ASSET way to wellbeing



ASSET
Education 

Finance Assistant Grade 3

Purpose of Job:

We are looking for a Finance Assistant to support our day-to-day transactions, including order processing, ensuring we use resources beneficially and processing any expenses claims .

Level Description

All duties will be carried out within recognised procedures or guidelines. The post holder will need to have knowledge of a range of organisation policies and procedures.

May include ad hoc duties, which require some initiative.

Will make day-to-day decisions about own workload, within a clear framework.

There will be some need to interpret information or situations to solve problems.

There may be some need to use analytical, judgemental, creative and developmental skills.

May oversee the work of others.

Manager is available for direction and guidance.

Introduction

The level description gives an overview of the level of competence required to carry out work at this level.

Each school is organised differently, and the range of duties carried out at this level will be different in each school. Some jobs may carry out a diverse range of duties whilst others may be engaged on a narrower range of tasks.

The next section of this benchmark job description will give examples of the types of work that may be carried out at this level. This list is not exhaustive and is intended to give a flavour to help schools to assimilate jobs to the appropriate level.

Examples of Duties at this Level

- Undertake a number of duties associated with providing an administrative service to the Headteacher/Senior staff and Trust Central Team for example:
 - Act as point of contact for the school, including telephone enquiries, receiving visitors, arranging hospitality and dealing with mail
 - Generate routine correspondence
- From information received, provide support during budget preparation and to set up appropriate budget allocations on the school's financial management system, record and monitor income and expenditure against budget headings and produce reports for Headteacher/senior managers as required
- Process daily financial transactions examples including reconcile purchase card statements, VAT and daily spreadsheets
- Receive and process monies/income/invoices, including processing & banking of cash/cheques and issue of receipts. Follow up as needed
- Maintain school fund records and participate in annual internal and external audits, as required.
- Ensure that deadlines are met for the completion and return of all finance statements for the Trust Central Team, as appropriate
- Process and maintain pupil and staff records, including travel/expense claims, class lists etc.
- Undertake administration for school lettings including liaison with related staff

The duties listed above are examples of duties at this level and other duties of a similar level/nature may be undertaken by individuals and are not excluded simply because they are not itemised.



Person Specification

Criteria	Essential to basic performance of job	Required for fully competent performance of job
Knowledge:		
Technical or specialist	<ul style="list-style-type: none"> • Demonstrable experience in a range of office/financial procedures. 	<ul style="list-style-type: none"> • Experience of advising/supporting staff. • Knowledge of computer systems e.g Google Drive
Literacy and numeracy	<ul style="list-style-type: none"> • Ability to monitor income and maintain accounts for school activities, e.g. dinner money. • Literacy needed for maintaining records and producing a range of correspondence. 	<ul style="list-style-type: none"> • Ability to use school's computerised financial management system
Organisational		<ul style="list-style-type: none"> • Knowledge of the school's financial procedures, e.g. banking. • Knowledge of basic health and safety and responsibilities. • Good understanding of school structure. • Knowledge of policies and procedures, e.g. sickness and absence records procedure. • Knowledge of administrative procedures, e.g. ordering, incoming/outgoing post.



Person Specification Continued...

Criteria	Essential to basic performance of job	Required for fully competent performance of job
Knowledge:		
Knowledge & use of equipment	<ul style="list-style-type: none"> • Ability to use/operate general office equipment, including reprographic, binding, audio typing or work-processing etc. 	<ul style="list-style-type: none"> • Knowledge of audiovisual equipment where appropriate. • Knowledge of school establishment's computerised systems, may include specialised software, e.g. Oracle, SIMS etc.
Any other (incl. Political)		<ul style="list-style-type: none"> • Broad understanding of Government initiatives and their impact on the school, e.g. Local Management of Schools.
Mental Skills:		
Research	<ul style="list-style-type: none"> • Prepare financial information for line manager/Area/ Headquarters. 	
Problem solving	<ul style="list-style-type: none"> • Identify variations from accepted patterns or missing documentation or other unusual aspects and refer them to line manager. • Carry out checks on stock deliveries and refer any queries to suppliers or line manager as appropriate. 	
Planning ahead	<ul style="list-style-type: none"> • Ensure routine and non-routine correspondence is produced on time. • Assist in the preparation for school activities e.g. sports day • Ensure work allocated to the team meets deadlines. 	

Person Specification Continued...

Criteria	Essential to basic performance of job	Required for fully competent performance of job
Interpersonal & Communications Skills:		
Caring skills	<ul style="list-style-type: none"> Attend to sick/injured pupils, make arrangements as required. 	
Training and / or presentation skills	<ul style="list-style-type: none"> May assist/contribute to induction training for new administrative/finance staff. 	
Advising / guiding skills	<ul style="list-style-type: none"> Provide advice and guidance to administrative/finance staff on range of issues, e.g. administrative & financial procedures & work allocation. May be required to informally advise teaching staff on administrative procedures, e.g. travel claims process. 	
Negotiating, influencing or conciliating skills	<ul style="list-style-type: none"> May be required to influence or conciliate between administrative/finance staff. 	
Verbal and written communications skills (including use of languages)	<ul style="list-style-type: none"> Make and receive telephone calls, answer queries or refer to line manager as required. Maintain a range of records, e.g. travel/expenses claims, class lists & pupil records, some of which may be confidential. 	



Person Specification Continued...

Criteria	Essential to basic performance of job	Required for fully competent performance of job
Physical Skills		
Keyboard skills / use of mouse	<ul style="list-style-type: none"> • Keyboard and mouse skills are required to undertake a range of tasks, such as the production of reports, routine and non-routine correspondence etc. 	<ul style="list-style-type: none"> • Ability to use school admin/finance systems with precision.
Other Attributes		
Level of autonomy	<ul style="list-style-type: none"> • The post holder will be expected to make day-to-day decisions about own workload and the workload of administrative/finance staff, where appropriate. • May include semi-routine tasks requiring some initiative. • The work is covered by guidelines and procedures. 	



Evaluation Notes

Knowledge

- It is essential that the post holder has good literacy and numeracy skills to undertake a range of tasks, e.g. minute taking, maintaining Head's diary, undertaking banking, checking travel/expense claims.
- Knowledge of a range of school procedures is needed to carry out the variety of duties. These are likely to include financial, health and safety and administrative policies and procedures. It is expected that the post holder would have a broad overview, gained from office experience and/or qualifications, specific procedures could be learnt in post.
- It is essential that the post holder has a broad knowledge of equipment, e.g. reprographics, audio typing and/or software package, e.g. Word, Excel. More in-depth knowledge for e.g. specific software packages could be obtained on the job as necessary.
- Experience of overseeing/supervising staff may be required.

Mental Skills

- Some analytical skills required e.g. resolving discrepancies between financial records.
- The post holder will undertake short term planning, e.g. managing own workload, ensuring deadlines are met, planning for school activities e.g. school trips/sports day.
- The post holder is likely to be the first point of contact for customer complaints. The post holder will deal with the less complex, deciding when to refer on to more senior staff.

Interpersonal and Communications

- The post holder will communicate with range of visitors, staff and pupils within the school, passing information/messages onto others some of which may be confidential and sensitive.
- The post holder needs to be able to communicate appropriately with pupils, according to their age, for straightforward advice on first aid.
- The post holder may advise and guide others on organisational procedures, e.g. administrative/finance staff on administrative procedures, parents on sick child or school events, teaching staff on expenses procedures.

Physical Skills

- Ability to use keyboard and mouse to produce accurate records, may include the production of reports, correspondence, inputting/updating personnel or financial information etc.
- Ability to use audio typing equipment.
- Work accurately with attention to detail.

Evaluation Notes Continued...

Initiative and Independence

- Majority of the work is covered by recognised procedures but with some scope for decision making.
- Manager may be less readily available than at Level A.
- Prioritise own work and, if supervising, that of others.

Physical Demands

- Minimal physical demands.

Mental Demands

- The post holder will be expected to switch between tasks during the course of the working day.
- It is likely there will be interruptions from staff and pupils.
- There will be tasks that require alertness and concentration, such as, counting dinner money, producing financial information, minute taking and drafting correspondence.

Emotional Demands

- The post holder may be required to attend to sick and injured pupils and make appropriate arrangements.

Responsibility for People

- The post holder assists in providing or supervising a front line service to visitors to the school. This will require an awareness of own customer care skills and those of administrative/finance staff.

Responsibility for Supervision (Employees)

- The post holder may supervise administrative/finance staff (one through to a small team). This may include overseeing their workload, establishing work programmes and assisting in induction training.

Responsibility for Financial Resources

- The post holder may collect, process and record cash amounts, such as, dinner monies, sale of tickets, supplies etc.
- The post holder is likely to be responsible for the school's banking.
- Certain financial tasks may require the post holder to account for monies, e.g. when checking bank statements, preparing cash statements, maintaining financial records etc.

Evaluation Notes Continued ...

Responsibility for Physical Resources

- May include responsibility for keys to school and safe and the ordering of stationery.
- Responsible for updating computerised system on financial information, including security of data.
- Careful use of office equipment.

Working Conditions

- Office-based.

Application

If you are interested in this role with ASSET Education please apply through MyNewTerm outlining how you meet the requirements of the person specification, and how your experience could enable us to bring our vision to life.

Interview Process:

Shortlisted candidates will be invited to attend an interview and all communication with details will be provided through My New Term.

