



Finance Assistant Job Description and Person Specification

Post title:	Finance Assistant
School:	St Paul's CofE Primary School
Pay range:	Band 7 SCP 11-17, 37 hours per week term time only
Line manager:	School Business Manager

Job Description

Core purpose

To provide a professional, efficient and effective administrative support service within the Finance Department.

The school is fully committed to safeguarding children and promoting their welfare and expects all staff to share in this commitment. All posts are subject to an Enhanced DBS with Barred List check.

This Job Description is furnished to assist staff joining St Paul's CofE Primary School to understand and appreciate the work content of their post and the role they are to play in the organisation.

Whilst every endeavor has been made to outline the main duties and responsibilities of the post, a document such as this does not permit every item to be specified in detail. This job description is not a definitive list of responsibilities but identifies the key components of the role. The post holder will, therefore, be required to undertake other reasonable duties commensurate with the purpose and salary level of this post.

Employees should not refuse to undertake work, which is not specified on this form, but they should record any additional duties they are required to perform, and these will be taken into account when the post is reviewed.

St Paul's CofE Primary School is an Equal Opportunities Employer and requires its employees to comply with all current equality policies both in terms of equal opportunity for employment and access to the School's Services.

St Paul's CofE Primary School is committed, where possible, to making any necessary reasonable adjustments to the job role and the working environment that would enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.

Duties and Responsibilities

Organisation

Prepare the monthly salary input and reconciliations ready for review and authorisation by the Business Manager.



Co-ordinate all accounting transactions of the school.

Provide advice and guidance to staff, students, parents/carers and others.

Administration

Collect and coordinate funds from staff, students and parents for trips and events.

Prepare banking on a weekly basis.

Operate petty cash ensuring records are maintained .

Process all orders, invoices and receipts / delivery notes as required.

Accurately maintain the Sales and Purchase Ledger records using the school's financial accounting systems.

Assist the School Business Manager and bursar in day-to-day activities and in the production of monthly management accounting information for the school accounts to trial balance stage.

Reconcile bank statements and make relevant journals.

Assist with the monitoring of school budget areas in line with agreed control procedures ensuring that orders are only processed where budgets allow.

Support the School Business Manager with the collection of debts in line with the school's Financial Procedures.

Liaise with suppliers in order to resolve queries that may arise.

Dealing with queries from parents and other stakeholders either in person, over the phone or via email.

Undertake general administrative duties (e.g. typing, photocopying, collation and distribution of documents, filing, scanning, etc.).

Maintain online and paper filing systems in line with retention and data protection guidelines.

Resources

Operate relevant equipment/ICT packages (e.g. MS Office, Internet, Email, School Information Management Systems, Financial Systems)

Constantly be aware of and implement the school's policies, in particular as it applies to the financial area.

Use financial resources and administration supplies resourcefully.



Wider Responsibilities

Be aware of and comply with policies and procedures relating to child protection /safeguarding, equality and diversity, health and safety, ICT, security, confidentiality and data protection, reporting all concerns to an appropriate senior person.

Comply and assist with the development of policies and procedures relating to area of responsibility as required.

Develop effective professional relationships with others.

Be aware of and support difference and ensure equal opportunities for all stakeholders accepting the principles underlying the school's equal opportunities policies and practice.

Maintain the confidential nature of information relating to school, its students, parents and carers acting in accordance with the principles of the Data Protection Act 2018 at all times.

Contribute to and support the overall life, work/aims and ethos of the school.

Attend and participate in relevant meetings as required.

Participate and engage in training and appraisal as required.

Undertake additional duties as reasonably requested by senior staff.

This job description is not your contract of employment, or any part of it. It has been prepared only for the purpose of school organisation and may change either as your contract changes or as the organisation of the school is changed. Nothing will be changed without consultation. This document must not be altered once it has been signed but it will be reviewed annually as part of the performance management process or as appropriate.

Signature of post holder _____ Date / /

Signature on behalf of the school _____ Date / /



**Person Specification
Finance Assistant**

	ESSENTIAL	DESIRABLE	How this will be identified
SKILLS AND EXPERIENCE	<ul style="list-style-type: none"> • Experience of administrative systems and ICT packages including Microsoft Office software • Methodical, organised approach to work • A high degree of accuracy and attention to detail • Ability to fulfil all spoken aspects of the role with confidence 	<ul style="list-style-type: none"> • Experience of the use of complex information or financial databases (e.g. FMS package) • Experience of working in a school 	Application / Interview / References
QUALIFICATIONS	<ul style="list-style-type: none"> • GCSE in English and Maths Grade C or above or equivalent 	<ul style="list-style-type: none"> • Administrative qualifications equivalent to level 2 • Health and safety qualification, e.g First Aid 	Interview / Documents
TRAINING	<ul style="list-style-type: none"> • Evidence of self-development • Willing to undertake training as required and assist in training colleagues 		Application / Interview / Documents
SPECIAL KNOWLEDGE		<ul style="list-style-type: none"> • Knowledge of education and policies and procedures relating to working in finance in a school 	Application / Interview / References

PERSONAL CIRCUMSTANCES	<ul style="list-style-type: none"> • Flexible in terms of working evenings on occasion in line with school calendar • Eligible to work in the U.K. • No contra-indications in personal background/criminal record indicating unsuitability to work with children/young people 		Interview / References Documents
DISPOSITION/ATTITUDE	<ul style="list-style-type: none"> • Ability to remain calm under pressure and prioritise demands to meet deadlines • Ability to communicate effectively at all levels • Flexible and positive approach to change • Willing to work as part of a team • Professional and customer service orientated • Ability to maintain a high level of confidentiality and discretion at all times. 		Interview / References
PRACTICAL/INTELLECTUAL SKILLS	<ul style="list-style-type: none"> • Analysis and critical evaluation • Proactive 	<ul style="list-style-type: none"> • Creative thinking • Able to contribute to the wider school community and activities 	Application / Interview / References
PHYSICAL/SENSORY	<ul style="list-style-type: none"> • Must be able to perform all duties and responsibilities in work location with reasonable adjustments where appropriate. 		Interview

EQUALITY & SAFEGUARDING	Candidates should indicate an acceptance of, and a commitment to, <ul style="list-style-type: none">• the principles of the school's equal opportunities policies and practices as they relate to employment issues and to the delivery of services to the community".• safeguarding and promoting the welfare of children and young people	Interview
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