



# **Thomas More Catholic School**

## **Finance & HR Assistant**

### **Role Profile and Person Specification**



# THOMAS MORE CATHOLIC SCHOOL

## Role Profile

<b>Job Title:</b>	School Finance & HR Assistant
<b>Scale:</b>	Admin Level 2, Scale 3/4, Point 14 -21 £20,136 - £22,425
<b>Hours:</b>	36hrs per wk x 52wks per yr Mon-Thu 8.00am-3.45pm Fri 8.00am-3.30pm (inc. 30min unpaid lunchbreak) 28 days holiday (under 5 years' service) / 33 days holiday (over 5 years' service)
<b>Location:</b>	Thomas More Catholic School
<b>Reports to:</b>	Director of Finance & Personnel / Headteacher
<b>Responsible for:</b>	N/A
<b>Role Purpose and Role Dimensions:</b>	<ul style="list-style-type: none"><li>Working under guidance/ instruction to provide an effective and efficient administrative financial support service to the School Business Manager, Head teacher and Governing Body for the efficient conduct of the school's administrative affairs and to ensure the smooth running of the school.</li></ul>
<b>Commitment to Diversity:</b>	<ul style="list-style-type: none"><li>As a member of the School Team to take individual and collective professional responsibility for championing the school's diversity agenda and proactively implementing initiatives which secure equality of access and outcomes.</li><li>Also to commit to continually developing personal understanding of diversity.</li></ul>
<b>Key External Contacts:</b>	<ul style="list-style-type: none"><li>All contacts for debtors and creditors.</li></ul>
<b>Key Internal Contacts:</b>	<ul style="list-style-type: none"><li>Director of Finance &amp; Personnel</li><li>HT</li><li>Budget Holders</li></ul>
<b>Key Areas for Decision Making:</b>	<ul style="list-style-type: none"><li>Use professional judgement.</li></ul>
<b>Other Considerations:</b>	<ul style="list-style-type: none"><li>Carry out any task as may be reasonably requested by the head teacher.</li></ul>

## **Key Accountabilities and Result Areas:**

**To be responsible for ordering and invoicing and to maintain controls checking authorisation for expenditure.**

## **Key Elements:**

### **This will involve:**

- To raise orders and commitments for stock and services.
- To process orders, invoices, credit notes and income.
- To check and following up all outstanding orders.
- To check the system for unauthorised/unprinted orders, and unauthorised invoices and ensure all cheques have been raised.
- To be responsible for receiving and checking goods on delivery.
- To administer and process the schools' insurance schemes and claims.
- Assist with preparation for school trips / visits e.g. book coaches, record monies received, distribute information, liaise between company and appropriate personnel at TMCS.
- Organise, administer and coordinate lettings, bookings / school fund donations / communicate details as appropriate.
- Hospitality for finance visitors.

**To be responsible for maintaining accurate records and producing reports and returns as appropriate.**

### **This will involve:**

- Check and process salary changes.
- To ensure that records are kept and re-claims made for individually funded students.
- To provide the Head teacher and Governing Body with information which will help them to monitor the budget and take financial decisions.
- To assist appropriate personnel to make statistical returns to the LA / Diocese and DfE as required.
- To be responsible for printing VAT returns and sending to the LA / Diocese and processing VAT reimbursements.
- To inform curriculum budget holders of budget/expenditure on a monthly basis.
- To assist the Head teacher / SBM with preparing a 'best value' statement.
- Assist the Head teacher / SBM to maintain and update the equipment register.

**To monitor and reconcile bank statements.**

### **This will involve:**

- To prepare banking and assist with the banking of monies.
- To reconcile the bank statements.
- To check and follow-up any out of date items on the bank statement.

**To undertake general finance duties.**

### **This will involve:**

- To administer the cashless payment system and the school fund.
- To be responsible for processing funding income, delegated and ad hoc.
- Process petty cash in line with the financial regulations and process petty cash reimbursements.
- To carry out other related duties to meet the needs of the school.
- To raise cheques and be a named signatory and to monitor cash flow.

## **Administration duties**

**This will involve all of the following as they relate to financial issues:**

- Photocopying / emailing / faxing / filing information.
- Undertake word processing / other IT based skills – mail-merging
- Produce lists / data as required.
- Operate relevant ICT equipment / systems – telephone / fax / PC etc.

## **HR Duties Overview**

- Maintain current HR files and databases
- Answer employee questions
- Participating in Recruitment efforts; posting job ads and organising applications
- Scheduling Job Interviews and assisting in interview process
- Collecting pre-employment information
- Preparing new employee files
- Preparation of letters relating to HR matters & procedures

## **Key Accountabilities and Result Areas:**

### **Key Elements:**

## **Green Statement**

**This will involve:**

- Seek opportunities for contributing to sustainable development of the borough, in accordance with the school's Green Commitment. In particular, demonstrate good environmental practice (such as energy efficiency, use of sustainable materials, sustainable transport, recycling and waste reduction) in management of the service provision.

## **Data Protection**

**This will involve:**

- To be aware of the school's responsibilities under the Data Protection Act 1998 for the security, accuracy and relevance of personal data held on such systems and ensure that all administrative and financial processes comply with this.
- To maintain client records and archive systems, in accordance with departmental procedure, policy and statutory requirements.

## **Confidentiality**

**This will involve:**

- You are expected to treat all information acquired through your employment, both formally and informally, in strict confidence. There are strict rules and protocols defining employees access to and use of the school's databases. Any breach of these rules and protocols will be regarded as subject to disciplinary investigation. There are internal procedures in place for employees to raise matters of concern regarding such issues as bad practice or mismanagement. (Whistle blowing Policy.)

## **Equalities**

**This will involve:**

- The Governors of TMCS have a strong commitment to achieving equality of opportunity in its services to the community and in the employment of people. It expects all employees to understand, comply with and to promote its policies in their own work, to undertake any appropriate training and to challenge racism, prejudice and discrimination.

**Customer Care****This will involve:**

- Able to demonstrate a commitment to customer care.

**Health and Safety****This will involve:**

- Every employee is responsible for their own Health and Safety, as well as that of colleagues, service users and the public. Employees should co-operate with management, follow established systems of work, use protective equipment where necessary and report defectives and hazards to management.

**To contribute as an effective and collaborative member of the School Team****This will involve:**

- To participate in training to be able to demonstrate competence.
- Participating in the ongoing development, implementation and monitoring of the service plans.
- Championing the professional integrity of the School Service
- Supporting Best Value and electronic management of processes.
- Actively sharing feedback on School policies and interventions.



## Person Specification

<b>Job Title:</b>	School Finance & HR Assistant
<b>Essential knowledge:</b>	<ul style="list-style-type: none"><li>• Understand the financial functions and duties of a locally managed school.</li><li>• A good understanding of and commitment to equal opportunities policies and its relationship to the Local Authority.</li><li>• The ability to use information technology to an intermediate standard.</li></ul>
<b>Essential skills and abilities:</b>	<ul style="list-style-type: none"><li>• The ability to undertake a wide range of financial and administrative tasks.</li><li>• The ability to adapt to both varying tasks and those of a routine nature.</li><li>• The ability to absorb information readily and speedily and work under pressure.</li><li>• The ability to respond effectively to staff, outside agencies, the Local Authority, suppliers and the general public at all levels, both in person and over the telephone.</li><li>• A good understanding of the need for confidentiality and secure financial systems.</li><li>• Proven literacy, numeracy and communication skills.</li><li>• Must be adept at problem-solving, including being able to identify issues and resolve in a timely manner.</li><li>• Must be able to communicate clearly with strong interpersonal skills</li><li>• Must be organised, accurate, thorough and able to monitor work for quality.</li><li>• Must be dependable, able to follow instructions, respond to management direction, and must be able to improve through performance management and feedback.</li></ul>
<b>Essential experience:</b>	<ul style="list-style-type: none"><li>• Be able to demonstrate experience of providing effective financial support.</li><li>• Experience of using and developing financial systems and procedures.</li></ul>
<b>Special conditions:</b>	<ul style="list-style-type: none"><li>• Willingness to undertake further training as required for example for the software used by the school finance system.</li><li>• The ability to work flexibly and ensure that essential tasks are carried out within agreed timetables.</li><li>• The physical ability to perform the duties of the post with the support of aids and adaptations if necessary.</li><li>• Undergo an enhanced CRB check.</li></ul>