



APPLEBY GRAMMAR SCHOOL

Kindness · Respect · Community



Finance Assistant

Applications from candidates with an interest in Finance, Business & Admin

Permanent, 15hrs per week, term time + 1 week - £26,402 pro rata

Start date : ASAP

Working hours can be flexible to suit candidate

Recruitment Information Pack



APPLEBY GRAMMAR SCHOOL

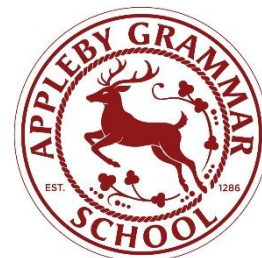
Kindness · Respect · Community

Recruitment Pack Contents

	Page
Values, Ethos and Aims	3
Introduction to the School	4
Job Description	5
Person Specification	7
Copy of the Advert	8
Privacy Notice	9

"Leaders have a clear and ambitious vision for the school."

OFSTED 2022



Our School Values are Kindness, Respect and Community

What is our Ethos?

- We are renowned for our moral purpose enshrined in our three school values. We believe that everyone can succeed, whatever their circumstances or background, when given a positive climate where all our community are treated with kindness and respect.
- We are committed to supporting the development of our students and our staff, ensuring they have the knowledge and skills to succeed in today's ever-changing world.
- We see our place as being at the heart of the local community and are committed to being an active and positive force in our local area and beyond.

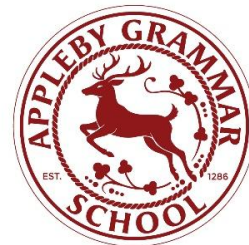
Our Aims for school community are:

- excellent leadership;
- high standards of professionalism;
- a relentless focus on improvement;
- very high standards of behaviour;
- a constant focus on teaching, learning and innovation;
- risk taking and succession planning;

We follow Local Authority admissions criteria and believe that local children should attend local schools, we are not selective and we are fully inclusive. We provide personalised professional development and training combined with an extensive range of career development opportunities; ensuring every colleague feels valued and appreciated.

"Pupils are very committed to their learning and their time in lessons well."

OFSTED 2022



Introduction to AGS

Dear Candidate,

We are a small comprehensive school set in a stunning rural location. The school is an academy with high standards and ambition for all our students. Our school values of Kindness, Respect and Community are lived out day to day.

Our carefully sequenced curriculum is strong and well balanced, with plenty of choice. We are committed to developing every student's particular strengths in an environment in which they can thrive. Appleby Grammar School is a member of the South Lakes Federation which provides support in many areas including networking for our curriculum areas.

As an 11-18 comprehensive school serving families throughout the historic town of Appleby-in-Westmorland, we pride ourselves on the fact that all students thrive in a caring environment and are well motivated and co-operative. Our students are courteous and have a high degree of respect for others. They are proud of their school and enjoy learning.

We are delighted to be recruiting for a new Finance Assistant. It is a post that is pivotal to the school's future development. Applications from candidates with an interest in finance, business & admin are welcome. We can offer you an exciting opportunity to work in a welcoming and supportive environment for students and staff alike.

We seek a person who embraces our school values and is:

- Highly professional and motivated;
- A supportive member of the team;
- Passionate in supporting the learning of young people;

We welcome committed, dynamic and creative applicants with a dedication for inspiring and improving the life chances of young people. We have high expectations of all our staff whether teaching or non-teaching and we value them **all** highly.

This is a very exciting time for the school and for the right candidate. Work started in September 2025 to rebuild our main teaching block and refurbish our current listed school buildings.

If you would like to visit and meet myself, or if I can assist your application process in anyway then please do not hesitate to contact me. The right candidate is the most important outcome for our students.

I look forward to meeting you.

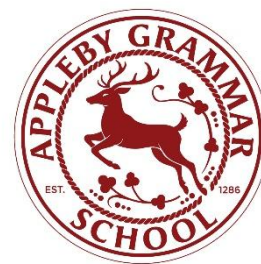
Yours sincerely

A handwritten signature in black ink, appearing to be 'P J Nicholson'.

Mr P J Nicholson
Headteacher

"The sense of community, support and care is a strength of the school."

OFSTED 2022



Job Description & Person Specification

Job Description

Job Title:	Finance Assistant
Salary:	£26,402 per annum pro rata
Hours of work:	Permanent – 15hours per week, term time plus 1 week
Department:	Finance
Responsible to:	Mrs Nikki Hipwell, Finance Manager

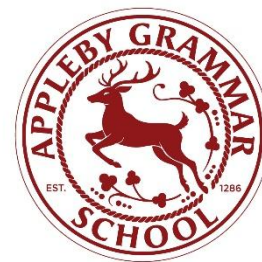
Main Duties and Responsibilities:

To support the Finance Manager in the provision of a high quality, efficient finance service for the school

- Supporting the day to day accounting procedures and recording of all financial transactions accurately on the financial software package
- Completing administrative routines relating to orders, invoices, cheques, income, payroll and the receipt and distribution of goods and services
- Undertake routine processing of sales invoices, credit notes and remittances, ensuring appropriate approval and paperwork is obtained
- Support colleagues with all procurement activities, ensuring value for money and creating savings for the school wherever possible
- Receive purchase order request forms from budget holders and generate purchase orders, ensuring correct approvals are obtained
- Order goods and services from suppliers
- Provide administrative support to the Finance Manager
- Match supplier invoices to purchase orders and enter supplier invoices onto the ledger
- Assist with the collection of meter readings from site operatives and forward to utility providers
- Forward meter reads to utilities suppliers, checking accuracy of subsequent invoices and unit costs.
- Ensure prompt payment to suppliers
- Maintain the filing of financial records
- Make journal entries and other accounting adjustments as necessary, including minibuss logs, photocopying and account transfers
- Provide timely budgetary information to faculty heads and other budget holders
- Complete monthly end routines and monitor cost centre spend

- Maintain an accurate and up to date approved supplier list
- Ensure all financial transactions are correctly coded to our chart of accounts to allow accurate monitoring of income and expenditure
- Process and account for monthly credit card payments and direct debits
- Respond to all finance queries relating to supplier & procurement purchases
- Lead initiatives for grant applications
- Maintain accurate records of vat returns, bursary applications and trip income & expenditure
- Assist other departments, contractors, pupils & and parents with queries
- Ensure all financial processes are carried out and reconciled in an effective and timely manner

This job description is not designed to be an exhaustive list of duties and responsibilities. It represents the current key areas of work. There may be additional duties and responsibilities explicit in the role. Further details can be discussed on interview.



Person Specification – Finance Assistant

	Ess	Des	MOA
KNOWLEDGE/QUALIFICATIONS			
GCSEs (or equivalent) including Maths and English	*		A/C
Knowledge of basic accounting principles	*		A/I
Awareness of financial procedures and controls	*		A/I
Understanding of data protection and confidentiality	*		A/I
Understanding of school financial systems (e.g. SIMS, FMS)		*	A/I
Awareness of safeguarding and child protection responsibilities	*		A/I
EXPERIENCE			
Experience working in an administrative or finance role	*		A/I/R
Experience working with financial records, payments or invoices		*	A/I/R
Experience of accounts payable/receivable processes		*	A/I/R
Experience using accounting software		*	A/I/R
SKILLS			
Strong numerical and analytical skills	*		A/I/R
High level of accuracy and attention to detail	*		AF/I
Good organisational and personal management skills	*		A/I/R
Effective time management	*		A/I/R
Ability to meet deadlines (including month-end/year-end processes)	*		A/I/R
Competent IT skills (especially Excel and finance systems)	*		A/I/R
Good communication skills (including dealing with parents, staff, suppliers)	*		A/I/R
Ability to maintain accurate financial records and reports	*		A/I/R
Ability to work independently and as part of a school team	*		A/I
Ability to prioritise workload in a busy school environment	*		A/I
BEHAVIOUR AND OTHER RELATED CHARACTERISTICS			
Reliable and trustworthy when handling confidential financial and pupil data	*		A/I/R
Professional manner when interacting with staff, pupils, parents and external agencies	*		A/I
Proactive and able to use initiative	*		I/R
Self-motivated with a positive attitude	*		A/I
Flexible to support wider school operations	*		A/I
Commitment to safeguarding, equality, diversity and inclusion	*		A/I
Commitment to adhering to school policies (e.g. safeguarding, health & safety, finance procedures)	*		A/I
Commitment to the ethos and values of the school	*		I
Commitment to own personal development and learning	*		I
The post holder will require an enhanced DBS	*		C

Key: ESS = Essential; Des = Desirable; MOA = Method of Application; A = Application; I = Interview and assessment; R = Reference; C = Certificate



APPLEBY GRAMMAR SCHOOL

Kindness · Respect · Community

Finance Assistant

Permanent – 15 hours per week, term time only plus 1 week

£26,402 per annum pro rata

The governors are seeking to appoint an enthusiastic and innovative person to contribute fully to the future development of the department and the school.

The successful candidate will:

- **Maintain and process financial transactions** by accurately recording income and expenditure, ensuring all data is correctly coded and up to date on the finance system.
- **Support procurement and budget management** by assisting staff with purchasing and orders, whilst ensuring value for money and providing timely financial information to budget holders.
- **Provide effective financial administration and support** by reconciling accounts, responding to queries from staff, parents, and suppliers, and ensuring all financial processes are completed accurately and in line with school procedures.
- Please see recruitment pack for further details.

We can offer you:

- the opportunity to join a supportive staff and governing body and work with well-motivated students;
- good facilities and superb location in the Eden Valley with easy access to the Lake District and Yorkshire Dales National Parks;
- the opportunity to join an improving and successful academy with good features.

Further details and a recruitment information pack can be downloaded from the school's website. Informal discussions with the Headteacher about this post are welcome.

- **Application is by completed application form including a statement, outlining the reasons for your application and why you consider yourself a suitable candidate for the role.**
- **The closing date for receipt of completed applications is 4.00pm on Monday, 22nd June 2026.**
- **Interviews to be held Thursday, 25th June 2026.**

Please note that if you have not been contacted then you must assume that you have not been shortlisted and your application has been unsuccessful.

Appleby Grammar School is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. The successful applicant will be subject to completion of satisfactory employment vetting checks in accordance with statutory guidance Keeping Children Safe in Education, September 2025.

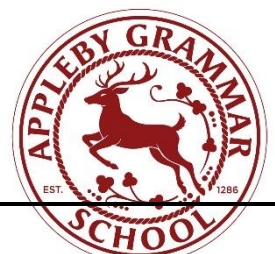
Headteacher: Mr P J Nicholson

Battlebarrow, Appleby-in-Westmorland, Cumbria CA16 6XU

T: 017683 51580 E: admin@appleby.cumbria.sch.uk

www.appleby.cum

Appleby Grammar School is a charitable company limited by guarantee in England and Wales
Registered office: Appleby Grammar School, Battle



Privacy Notice – Job Applicants

1. Introduction

Under UK data protection law, individuals have a right to be informed about how our school uses any personal data that we hold about them. We comply with this right by providing 'privacy notices' (sometimes called 'fair processing notices') to individuals where we are processing their personal data.

This privacy notice explains how we collect, store, and use personal data about **individuals applying for jobs at our school**.

We, Appleby Grammar School, Battlebarrow, Appleby, Cumbria, CA16 6XU – 017683 51580, are the 'data controller' for the purposes of UK data protection law.

Our data protection officer is Darren Hobson (see 'Contact us' below).

2. The personal data we hold

Personal data that we may collect, use, store and share (when appropriate) about you includes, but is not restricted to:

- Contact details
- Copies of right to work documentation
- References
- Evidence of qualifications
- Employment records, including work history, job titles, training records and professional memberships

We may also collect, use, store and share (when appropriate) information about you that falls into "special categories" of more sensitive personal data. This includes, but is not restricted to:

- Information about race, ethnicity, religious beliefs, sexual orientation and political opinions
- Information about disability and access requirements
- Photographs and CCTV images captured in school

We may also collect, use, store, and share (when appropriate) information about criminal convictions and offences.

We may also hold data about you that we have received from other organisations, including other schools and social services, and the Disclosure and Barring Service in respect of criminal offence data.

3. Why we use this data

We use the data listed above to:

- a) Enable us to establish relevant experience and qualifications
- b) Facilitate safe recruitment, as part of our safeguarding obligations towards pupils
- c) Enable equalities monitoring
- d) Ensure that appropriate access arrangements can be provided for candidates that require them

3.1 Use of your personal data for marketing purposes

Where you have given, us consent to do so, we may send you marketing information by email or text promoting school events, campaigns, charitable causes or services that may be of interest to you.

You can withdraw consent or 'opt out' of receiving these emails and/or texts at any time by clicking on the 'Unsubscribe' link at the bottom of any such communication, or by contacting us (see 'Contact us' below).

3.2 Use of your personal data in automated decision making and profiling

We do not currently process any personal data through automated decision making or profiling. If this changes in the future, we will amend any relevant privacy notices in order to explain the processing to you, including your right to object to it.

4. Our lawful basis for using this data

Our lawful bases for processing your personal data for the purposes listed in section 3 above are as follows:

- For the purposes of 3a, 3b, 3c and 3d above, in accordance with the 'public task' basis – we need to process data to fulfil some of our statutory functions as a school.

Where you have provided us with consent to use your data, you may withdraw this consent at any time. We will make this clear when requesting your consent, and explain how you would go about withdrawing consent if you wish to do so.

4.1 Our basis for using special category data

For 'special category' data, we only collect and use it when we have both a lawful basis, as set out above, and one of the following conditions for processing as set out in UK data protection law:

- We have obtained your explicit consent to use your personal data in a certain way
- We need to perform or exercise an obligation or right in relation to employment, social security or social protection law
- We need to protect an individual's vital interests (i.e. protect your life or someone else's life), in situations where you're physically or legally incapable of giving consent
- The data concerned has already been made manifestly public by you
- We need to process it for the establishment, exercise or defence of legal claims
- We need to process it for reasons of substantial public interest as defined in legislation
- We need to process it for health or social care purposes, and the processing is done by, or under the direction of, a health or social work professional or by any other person obliged to confidentiality under law
- We need to process it for public health reasons, and the processing is done by, or under the direction of, a health professional or by any other person obliged to confidentiality under law
- We need to process it for archiving purposes, scientific or historical research purposes, or for statistical purposes, and the processing is in the public interest

For criminal offence data, we will only collect and use it when we have both a lawful basis, as set out above, and a condition for processing as set out in UK data protection law. Conditions include:

- We need to perform or exercise an obligation or right in relation to employment, social security or social protection law
- We have obtained your consent to use it in a specific way
- We need to protect an individual's vital interests (i.e. protect your life or someone else's life), in situations where you're physically or legally incapable of giving consent
- The data concerned has already been made manifestly public by you
- We need to process it for, or in connection with, legal proceedings, to obtain legal advice, or for the establishment, exercise or defence of legal rights

- We need to process it for reasons of substantial public interest as defined in legislation

5. Collecting this data

While the majority of information we collect about you is mandatory, there is some information that can be provided voluntarily.

Whenever we seek to collect information from you, we make it clear whether you must provide this information (and if so, what the possible consequences are of not complying), or whether you have a choice.

Most of the data we hold about you will come from you, but we may also hold data about you from:

- Local authorities
- Government departments or agencies
- Police forces, courts, tribunals

6. How we store this data

We keep personal information about you during the application process. We may also keep it beyond this if this is necessary. Our Record Keeping and Retention Policy sets out how long we keep information about job applicants. You can view or obtain a copy of the policy on our website or from the school office.

We have put in place appropriate security measures to prevent your personal information from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed.

We will dispose of your personal data securely when we no longer need it.

7. Who we share data with

We do not share information about you with any third party without consent unless the law and our policies allow us to do so.

Where it is legally required, or necessary (and it complies with UK data protection law), we may share personal information about you with:

- Our local authority – to meet our legal obligations to share certain information with it, such as safeguarding concerns
- Suppliers and service providers – to enable them to provide the service we have contracted them for, such as HR and recruitment support
- Professional advisers and consultants
- Employment and recruitment agencies

7.1 Transferring data internationally

We may share personal information about you with international third parties, where different data protection legislation applies. Where we transfer your personal data to a third-party country or territory, we will do so in accordance with UK data protection law.

In cases where we have to set up safeguarding arrangements to complete this transfer, you can get a copy of these arrangements by contacting us.

8. Your rights

8.1 How to access personal information that we hold about you

You have a right to make a 'subject access request' to gain access to personal information that we hold about you.

If you make a subject access request, and if we do hold information about you, we will (subject to any exemptions that may apply):

- Give you a description of it

- Tell you why we are holding and processing it, and how long we will keep it for
- Explain where we got it from, if not from you
- Tell you who it has been, or will be, shared with
- Let you know whether any automated decision-making is being applied to the data, and any consequences of this
- Give you a copy of the information in an intelligible form

You may also have the right for your personal information to be transmitted electronically to another organisation in certain circumstances.

If you would like to make a request, please contact us (see 'Contact us' below).

8.2 Your other rights regarding your data

Under UK data protection law, you have certain rights regarding how your personal data is used and kept safe. For example, you have the right to:

- Object to our use of your personal data
- Prevent your data being used to send direct marketing
- Object to and challenge the use of your personal data for decisions being taken by automated means (by a computer or machine, rather than by a person)
- In certain circumstances, have inaccurate personal data corrected
- In certain circumstances, have the personal data we hold about you deleted or destroyed, or restrict its processing
- Withdraw your consent, where you previously provided it for the collection, processing and transfer of your personal data for a specific purpose
- In certain circumstances, be notified of a data breach
- Make a complaint to the Information Commissioner's Office
- Claim compensation for damages caused by a breach of the data protection regulations

To exercise any of these rights, please contact us (see 'Contact us' below).

9. Complaints

We take any complaints about our collection and use of personal information very seriously.

If you think that our collection or use of personal information is unfair, misleading or inappropriate, or have any other concern about our data processing, please raise this with us in the first instance.

Alternatively, you can make a complaint to the Information Commissioner's Office:

- Report a concern online at <https://ico.org.uk/make-a-complaint/>
- Call 0303 123 1113
- Or write to: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF

10. Contact us

If you have any questions, concerns or would like more information about anything mentioned in this privacy notice, please contact our **data protection officer**:

Darren Hobson
Appleby Grammar School
Battlebarrow
Appleby
Cumbria
CA16 6XU
Tel: 017683 51580
Email: admin@appleby.cumbria.sch.uk