

Job Family Code	5BF	Role Title	Assistant Academy Business Leader (Finance)
Grade	S5	Reports to (role title)	Academy Business Leader
JE Band	228-268	School	Esher Learning Trust
		Date Role Profile created	February 2020

Part B - Job Family Description

The below profile describes the general nature of work performed at this level as set out in the job family. It is not intended to be a detailed list of all duties and responsibilities which may be required. The role will be further defined by annual objectives, which will be developed with the role holder. The Council reserves the right to review and amend the job families on a regular basis.

Role Purpose including key outputs

Assist the Academy Business Leader (ABL) in providing effective and efficient finance statutory regulations and school policy. Provide support, as directed by the ABL to the schools' Leadership teams and the Governing Body members.

Key deliverables include:

School Fund:

- Oversee and support the Admin Assistant (Level 1) who delivers the full range of financial procedures related to School Fund, including placing orders, invoicing, preparation of cheques, banking cash, receiving and recording money from pupils/parents and carers Receive and record monies from pupils and parents / carers
- Undertake weekly banking of school fund
- Undertake monthly reconciliations, for example of the school fund bank account and petty cash ensuring security and accuracy at all times;
- As required recommend improvements to the design and implementation of the school fund financial procedures and systems;

Finance General

As required support the ABL with:

- the maintenance of the school's accounting systems in accordance with financial regulations and procedures
- production of a range of financial information and analysis for the senior leadership team and governance, generating statistical and other reports meeting required deadlines;

	<p>Policy and Procedure:</p> <ul style="list-style-type: none"> • Maintain local policies, where appropriate, related to school fund financial, ensuring statutory and other policies are in place and reviewed on a timely basis and working with the ABL in this regard • Manage, coordinate and review processes and procedures, related to school fund financial, ensuring they support delivery of statutory and policy requirements <p>Deputise for the ABL as needed within the scope of the areas indicated</p>
Esher Learning Trust Work Context and Generic Responsibilities	<p>The role is based at St Andrew's CofE Primary School in Cobham which is part of the Esher Learning Trust.</p> <p>Esher Learning Trust expects all its staff to:</p> <ul style="list-style-type: none"> • Maintain confidentiality in and outside of the workplace • Be pro-active in matters relating to health and safety and report accidents as required • Support the aims and ethos of the Trust setting a good example in terms of dress, behaviour, punctuality and attendance • To carry out all such other duties as the SLT or your line manager may reasonably direct. <p>The post holder will work alongside the schools administrative team led by the Office Manager/PA to the Head Teachers, and the Academy HR Manager. The functional links that will support the delivery of the role are clarified in the attached operational overview. The role of Finance assistant is delivered by a contractor specialising in school finance support.</p>
Line management responsibility if applicable	N/A
Budget responsibility if applicable	N/A
Representative Accountabilities Typical accountabilities in roles at this level in this job family	<p>Analysis, Reporting & Documentation</p> <ul style="list-style-type: none"> • Ensure information and records are processed and stored to agreed procedures. • Assist in providing and manipulating basic data for statistical and other reports. May run and present standard reports. • Prepare and despatch a range of standard correspondence/documents to ensure an efficient response to enquiries and timely conclusion of any process connected with the defined area of activity. <p>Service Delivery</p> <ul style="list-style-type: none"> • Deliver a range of administrative and/or customer/consultancy services in support of existing systems or processes to agreed standards, to maximise service quality and continuity. • Receive and respond to everyday enquiries from customers to provide a timely, courteous and efficient service. <p>Planning & Organising</p> <ul style="list-style-type: none"> • Support a group of senior staff, ensuring confidentiality, and assisting in the effective organisation of internal/external meetings and activities to support a high standard of office organisation.

	<ul style="list-style-type: none"> Assess the range and volume of work to be undertaken for the days ahead and plan to ensure it is completed to time and to an appropriate standard. <p>Finance/Resource Management</p> <ul style="list-style-type: none"> Follow established ordering procedures to ensure adequate resources are available to meet work requirements. Work with others Receive visitors and provide/request basic information in a courteous manner to promote a positive image of the work unit. <p>Duties for all</p> <p>Values: To uphold the values and behaviours of the organisation.</p> <p>Equality & Diversity: To work inclusively, with a diverse range of stakeholders and promote equality of opportunity.</p> <p>Health, Safety & Welfare: To maintain high standards of Health, Safety and Welfare at work and take reasonable care for the health and safety of themselves and others.</p> <p>To have regard to and comply with safeguarding policy and procedure as appropriate</p>
Education, Knowledge, Skills & Abilities, Experience and Personal Characteristics	<ul style="list-style-type: none"> Numerate Good communication and IT skills
Details of the specific qualifications and/or experience if required for the role in line with the above description	<ul style="list-style-type: none"> Minimum 3 GCSEs at Grade C or above, or equivalent, or able to evidence ability at an equivalent level. Familiar with one or more of the specific processes used in business, communication, financial or HR administration. Ability to apply relevant health and safety, equality and diversity, and other county/service policies and procedures. Competent in a range of IT tools. Ability to work with others to achieve objectives and provide excellent customer service. Good written and oral communication skills with the ability to build sound relationships with staff and customers. Ability to prioritise and plan own workload in the context of conflicting priorities. Experience of working in a busy office environment.
Role Summary	<p>Roles at this level provide a comprehensive business support service in a defined service or functional area, or provide specialist support services. Many will possess technical rather than professional expertise in the main disciplines, or have substantial experience of administrative procedures to enable them to guide and advise others. There will be minimal day-to-day supervision, but clear guidance is available. The roles will plan for the weeks ahead and prioritise to accommodate non standard work. They often require understanding of complex procedures and support systems, and the ability to allocate workload and react to changing priorities. Although most work will follow established patterns, initiative is needed to handle processes and resolve problems and queries based on experience and judgement, mainly without reference to others. These roles may work alone instead of as part of a team, or the system or process used may require specialist knowledge or experience. Some roles involve supervision of staff, others involve undertaking specialist functions or the provision of a broad comprehensive business admin services which may include coordinating activities, different customer and service users.</p>