

JOB DESCRIPTION

JOB TITLE	Secondary Finance and HR Lead (JMA)
GRADE BAND	Q
RESPONSIBLE TO	Head of Planning
DEPARTMENT	Finance / HR
DATE JD/PS SIGNED OFF	July 2019

SIGNED	
PRINTED	
DATED	

SAFEGUARDING COMMITMENT

The White Horse Federation is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. If successful in being appointed to a post you will be expected to apply for a disclosure from the Disclosure and Barring Service as well as other employment checks before your appointment is confirmed.

JOB PURPOSE

To work in collaboration with the Head of Planning, Hub HR Business Partner, Principal and Director, Head of Finance in order to provide an effective and efficient HR and Finance Support Service to the Principal with key responsibilities for:

- Budget management and monitoring
- Provide comprehensive financial administration services
- Staff data
- Recruitment administration
- Absence recording and monitoring
- Pay administration
- Line management of the Finance and HR Assistant

This role is based in a secondary school and will play a pivotal part of the White Horse Federation central finance and HR teams to facilitate the delivery of these key services.

MAIN TASKS, DUTIES & RESPONSIBILITIES

Key Accountabilities - Finance:

- Assist the Head of Planning in the preparation of the school budget and three year forecast plans.
- Responsible for school budget control and monitoring, reporting to Principal and Head of Planning functionally.
- Work with TWHF Central Accounting team to provide detailed current year performance variance analysis and, in conjunction with Head of Planning, develop corrective action plans with Principal as needed.
- Check and monitor SEN income with school SENDCo & TWHF Central Accounting team, and link with LA & TWHF Central Finance Team for school as needed.
- Work with the SLT lead on Pupil Premium for tracking of spend against budget.
- To be directed by the TWHF Central Accounting team in terms of accounting entries that need to be performed at the school, including all coding of Income & Expenditure. To liaise with TWHF Central Accounting team on cost centre ownership for approval levels.
- Reconciliation of monthly payroll against budget. Ensuring that staff changes are updated accordingly in HCSS.
- Liaise with budget holders to ensure efficient management of Cost Centres – both in terms of spend YTD and Full year expectation
- Ensuring that cash limits do not exceed safe limits. Control of Petty Cash within TWHF finance guidelines
- Control of School Credit card transactions within TWHF finance guidelines, and completion of reconciliations, as guided by the TWHF Central Accounting team.
- Co-Ordination and management of Trip Finances.
- Management of School online payment system (Parentpay)
- Ensure all order/invoices are raised in a timely manner and non-payments are chased
- Check the financial elements of any Census returns are correct before submission by the School Data Manager

HR Duties and Responsibilities include:-

Recruitment

- Discuss resource requirements with the recruiting managers and ensure vacancies are approved and advertised via the TWHF application tracking system following discussions with the recruiting managers and other relevant staff.
- To ensure job offer letters to the successful candidate(s) contain all supporting information required by TWHF.
- To ensure all pre-employment checks are carried out without delay e.g. DBS, Occupational Health etc.
- Ensure new starters are compliant with regards to safeguarding within one week of their start date and oversee induction for new staff regarding school policies, mandatory training and operations

Pay

- Working in collaboration with central HR and outsourced payroll to ensure all Payroll Administration is undertaken adhering to TWHF policies and procedures and payroll cut-off dates and staff are paid correctly.
- To ensure any pay queries are dealt with efficiently and effectively.
- To ensure monthly additional hours returns and absence returns and send these to our outsourced payroll provider and Central HR team
- To liaise with outsourced provider to ensure variation to terms and conditions are processed correctly and that correspondence is sent to staff.

Absence Recording

- To ensure staff absence is closely monitored and all necessary Self-Certification Forms are completed and/or medical certificates received.
- To undertake suitable analysis of sickness absence patterns and reasons and follow up with the Hub HR Business Partner and Principal.
- To ensure monthly absence data are provided to the Central HR team and Hub HR Business Partner. As and when required provide ad hoc absence data.
- Liaise with the Hub HR Business Partner and the Central HR team regarding any early retirement on ill-health grounds or death in service cases.
- To ensure back to work interviews are held by line managers and sickness review meetings as agreed with Hub HR Lead and Principals

Leavers

- To ensure all necessary forms and paperwork for leavers is processed.
- Ensure the return of school equipment from leavers, such as key, badges, laptops, phones etc.

Systems Management

- Ensure all staff details are regularly updated on HR Management Information System.
- Where appropriate, complete the school workforce census is uploaded within DfE guidelines and timeframes

Safeguarding

- Ensure all staff complete basic safeguarding training on an annual basis and escalate any anomalies to Hub HR Business Partner / Head of HR.
- Ensure all staff mandatory training is current e.g. first aid, safer recruitment, fire etc.
- Ensure all staff details are regularly updated on the Single Central Record working with the Pupil Services team to ensure visitor data is being updated by relevant members of staff based in the school.
- Escalate any risks with regards to the Single Central Records and mandatory training to Head of HR immediately.

Employee Relations

- Support the Hub HR Business Partner with ER cases as and when required
- Liaise with trade unions as required
- Undertake Stage 1 sickness monitoring meetings with the line managers. Supported by the Hub HR Business Partner as and when required.

Additional Duties and Responsibilities:

- Review the ways that HR service is delivered in order to continually improve and identify effective ways of working.
- Supporting with project work for the wider HR team as and when required.
- The post holder may be required to perform duties other than those given in the job description for the post. The particular duties and responsibilities attached to posts may vary from time to time without changing the general character of the duties or the level of responsibility entailed. Such variations are a common occurrence and would not of

themselves justify the re-evaluation of a post. In cases, however, where a permanent and substantial change in the duties and responsibilities of a post occurs, consistent with a higher level of responsibility, then the post would be eligible for re-evaluation.

- In fulfilling the requirements set out in this job description, the post holder will apply the TWHF's commitment to equality by treating all employees fairly and without discrimination on the grounds of colour, race, ethnic or national origins, sexual orientation, age, marital status, disability, trade union association or religious beliefs.
- In addition, the job holder will respect the need for confidentiality at all times whilst performing the duties of the role.
- The post holder will have the ability and means to travel on a regular basis across TWHF sites and occasionally to other locations

PERSON SPECIFICATION



Method of Assessment This table indicates the requirements of the role under section to evaluate the competencies in each area as assessed	Essential or Desirable	Application Form	Interview Stage
Qualifications, Education and Training			
Associate member of the CIPD or equivalent qualifications or relevant experience in HR	E	X	
Suitable financial business qualification or relevant experience in school business finance e.g. AAT, CSBM, DSBM	E	X	
Experience and Knowledge			
Full working knowledge of Microsoft Office and Microsoft Outlook and good working knowledge of Excel	E	X	X
Knowledge and understanding of culture, legislation and employment procedures specific to staff working in schools	D		X
Experience of taking notes at HR meetings	D		X
Knowledge of current Employment Law and HR best practice	E		X
Evidence of collaborative working across a complex organisation	E		X
Working knowledge of safeguarding procedures and an understanding of HR's role in this area	D		X
Experience of financial planning, accounting and forecasting	E	X	X
Skills and Abilities			
Ability to prioritise effectively and deliver on objectives	E		X
Working to, and delivering to, tight deadlines	E		X
Well-developed interpersonal skills to establish working relationships quickly and effectively	E		X
Excellent written and verbal communication skills	E	X	X
Positive, solutions-focused approach	E		X
Ability to appropriately deploy HR/Finance process, policy, practice, tools and techniques as required	E		X
Experience of staff line management	D	X	X

Excellent customer service skills	E		X
Ability and means to travel to other sites and external meetings when required	E		X
Contacts and Relationships			
The White Horse Federation Colleagues – up to and including CEO			
Third Party suppliers			