

## **JOB DESCRIPTION**

**JOB TITLE:** Finance Officer/ Educational Visits Co-ordinator – Role C

**SECTION:** Patcham High School

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### **1. PURPOSE OF JOB**

- Under the guidance of senior staff, undertake administrative / financial / organisational processes as required. Assist with the planning and development of finance services.
- Support with the organisation of school trips and event, including seeking and passing on advice on health & safety matters and legal requirements.

### **2. PRINCIPAL ACCOUNTABILITIES**

#### **Organisation**

- Deal with complex matters as required from staff, students and parents.
- Act as first point of contact for School Business Manager, including telephone enquiries, receiving visitors, arranging hospitality and dealing with mail
- Act as first point of contact in dealing with customer complaints, referring on to more senior staff as appropriate
- Oversee the organise school trips, events etc
- Contribute to the planning, development and organisation of financial service systems / procedures / policies
- Supervise, train and develop staff as appropriate

#### **Administration**

- Identify, set up and manage manual and computerised records / management information systems
- Analyse and evaluate data / information and produce reports / information / data as required
- Undertake typing, word-processing and complex IT based tasks
- Provide personal, administrative and organisational support to School Business Manager, making appointments, arranging and preparing for meetings etc. and generating routine correspondence as required

- Maintain the Head Teacher's and / or school's filing system as required
- Attend and take minutes at meetings, as required
- Undertake administration of complex procedures
- Complete and submit complex forms, returns etc., including those to outside agencies, e.g. DfES
- Undertake the administration of Payroll systems liaising with the relevant departments at the Local Authority.
- Oversee the accurate recording and updating of pupil and staff information using both manual and computerised records
- Sort incoming and outgoing mail and maintain necessary records

### **Resources**

- Operate relevant equipment / complex ICT packages (e.g. Word, Excel, graphics, database, Internet)
- Monitor and manage stock within an agreed budget, cataloguing resources and undertaking audits as required
- Provide general advice to staff, pupils and others
- Undertake research and obtain information to inform decisions
- Assist with procurement and sponsorship
- Assist with marketing and promotion of the school
- Manage administration of facilities including use of school premises
- Undertake complex financial administration procedures, which may include:
  - assisting in the planning of budget(s)
  - setting up appropriate budget allocations on the school's financial management system
  - recording and monitoring income and expenditure against budget headings
  - producing reports for the Head Teacher / senior managers as required
  - ensure monies / invoices are processed and banked
  - maintaining financial records, checking bank statements and preparing cash statements as appropriate using computerised system
  - analysing and investigating financial information in order to produce reports and financial statements for internal and external requirements
  - maintaining school fund records and prepare annual balance sheets for audit

### **Responsibilities**

- Comply with and assist in the development of related policies and procedures relating to child protection, health, safety and security, confidentiality and data protection, reporting all concerns to an appropriate person
- Be aware of and support difference and equal opportunities for all
- Contribute to the overall ethos / work / aims of the school
- Establish constructive relationships and communicate with other agencies / professionals

- Attend and participate in regular meetings
- Participate in training and other learning activities and performance development as required
- Recognise own strengths and areas of expertise and use these to advise and support others
- Understand that keeping children safe is paramount in our school and that all employees must take responsibility for ensuring that any safeguarding concerns are quickly reported to the appropriate person.
- Undertake all safeguarding training required by the school.

The list of duties in the job description should not be regarded as exclusive or exhaustive. There will be other duties and requirements associated with your job and, in addition, as a term of your employment you may be required to undertake various other duties as may reasonably be required.

Your duties will be as set out in the above job description but please note that the Council reserves the right to update your job description, from time to time, to reflect changes in, or to, your job.

You will be consulted about any proposed changes.

## PERSON SPECIFICATION

**POST TITLE:** Admin/Organisational Support Role C

### CRITERIA

### ESSENTIAL CRITERIA

#### Job Related Education and Qualifications and Knowledge

- NVQ Level 3 or equivalent qualification or experience in relevant discipline
- Good knowledge and understanding of relevant ICT packages, including the school's specialist software / equipment / resources
- Full working knowledge and understanding of range of relevant policies / codes of practice and awareness of relevant legislation
- Appropriate knowledge of first aid

#### Experience

- Demonstrable experience of development, management and operation of administrative systems likely to have been gained over a period of two years

#### Skills & Abilities

- Good numerical skills to undertake a variety of tasks, e.g. maintaining accounts for schools activities, producing financial reports
- Good literacy skills to undertake a variety of tasks, e.g. minute taking, maintaining diary(ies) producing correspondence on behalf of the Head Teacher
- Very good ICT skills, e.g. production of reports, correspondence, inputting / updating information
- Able to relate well to children and adults, often on behalf of the Head Teacher, e.g. dealing with visitors, passing information / messages to other staff, dealing with sick children, providing advice
- Some need to use analytical, judgmental, creative and developmental skills, e.g. when setting up appropriate systems and producing financial information for line managers / auditors
- Able to demonstrate sensitivity and tact particularly when dealing with the more sensitive issues
- Able to maintain confidentiality
- Able to work accurately and with attention to detail
- Alertness and concentration, e.g. producing financial information, minute taking and drafting correspondence
- Able to undertake short term planning, e.g. managing own workload, managing the work of others, ensuring deadlines are met, planning for school activities, e.g. school trips / sports day
- Able to deal with more complex queries and know when to refer to

more senior staff

- Able to work constructively as part of a team and to understand school roles and responsibilities and own position within these
- Able to self evaluate learning needs and actively seek learning opportunities

**Equalities**

- To be able to demonstrate a commitment to the principles of Equalities and to be able to carry out duties in accordance with the Council's Equalities Policy.