

JOB DESCRIPTION

Post Title:	Finance Assistant / Secretary		
Department:	Education	Grade:	BEX07
Responsible to:	Office Manager & School Business Manager		

Main purpose of the job:

- To support the organisation and smooth running of the School Office, ensuring a calm, efficient and professional environment where all administrative procedures are correctly followed and coordinated.
- To provide high-quality administrative and confidential support to the Head Teacher and Senior Leadership Team (SLT).
- To undertake administrative responsibilities across the school, with a particular focus on financial administration, compliance and whole-school coordination.
- To support the School Business Manager (SBM) in the day-to-day operation of financial procedures, budget monitoring and reporting, ensuring accuracy and adherence to regulations.

Duties and responsibilities

Whole School Responsibilities

- Safeguard and promote the welfare of children and young people.
- Comply with all school policies, including safeguarding, health and safety, data protection, confidentiality and equality.
- Contribute to the ethos, values and continuous improvement of the school.
- Develop effective professional relationships with staff, pupils, governors, suppliers and visitors..
- Maintain professionalism, confidentiality and high standards of conduct at all times.
- Engage in continuous professional development and training.

Financial Administration

- Maintain oversight of financial transactions arising from procurement activities, ensuring accurate processing from order to payment.
- Process invoices and payments in line with financial procedures, ensuring correct authorisation, coding and supplier details.
- Carry out detailed invoice checks, including verification of VAT treatment and prevention of duplicate payments.
- Maintain and update the school's financial systems (e.g. FMS, Bromcom, ParentMail), ensuring accuracy of data and correct budget coding.
- Prepare BACS payment runs for approval, ensuring supplier bank details are validated and any changes are appropriately verified.
- Generate sales invoices for services, funding and lettings.
- Collect, record and reconcile all income, including trips, clubs, wraparound care and lettings, ensuring all remittances are received.
- Support the reconciliation of school purchase cards, ensuring all transactions are supported by valid receipts and appropriately authorised.
- Process staff expense claims, timesheets and reimbursements.

- Assist with budget monitoring by maintaining accurate records and identifying any variances for the SBM.
- Assist in the preparation of financial reports and returns for the SBM and Governors.
- Respond to routine financial queries from staff, suppliers and contractors, escalating the more complex issues as appropriate.
- Ensure all financial procedures comply with audit requirements and school policies.
- Report any suspected financial irregularities or breaches of procedure in line with the school's Whistleblowing Policy.

Procurement and General Office Duties

- Ensure all purchase orders are appropriately authorised prior to processing in line with delegated limits.
- Place and track orders, ensuring timely delivery of goods and services.
- Liaise with suppliers to obtain best value and resolve routine purchasing queries.
- Oversee and coordinate the process for the opening of deliveries and receipt of goods, ensuring appropriate segregation of duties is maintained and that all items are accurately checked, recorded and authorised in line with financial procedures and audit requirements.
- Resolve discrepancies with suppliers relating to orders or deliveries.
- Maintain inventory and ensure adequate stock levels of office supplies.
- Provide reprographics support (printing, photocopying, laminating and binding).

Administrative and Secretarial Support

- Provide confidential and effective administrative support to the SLT, including preparing correspondence and reports.
- Coordinate and maintain the whole-school calendar, ensuring all events, activities and key dates are accurately recorded and communicated.
- Maintain administrative systems and ensure statutory returns (e.g. DfE/LA) are completed accurately and on time.
- Ensure all records are maintained in line with GDPR and data retention requirements.
- Provide general administrative support to ensure the effective day-to-day operation of the school office, supporting colleagues and maintaining efficient systems and processes.

School Communications and Coordination

- Coordinate and produce the school newsletter.
- Maintain and update the school website, ensuring statutory compliance and that content is current and accurate.
- Coordinate the policy review cycle, ensuring policies are updated, tracked, and submitted for approval within required timescales.
- Support consistent and effective communication across the school community.

Reception and Stakeholder Engagement

- Act as a key point of contact for the school, managing telephone calls, emails, visitors and general enquiries in a professional manner.
- Ensure all visitors are welcomed and that safeguarding procedures are followed.
- Promote positive relationships with parents/carers and the wider school community.

Pupil Administration and Welfare

- Maintain accurate pupil records on school systems (Bromcom & Parentmail).
- Support attendance procedures and ensure safeguarding processes are followed.
- Provide first aid and care for unwell pupils, including maintaining records of medication administered and liaising with parents and staff.

Compliance and General Responsibilities

- Ensure all work is carried out in line with school policies relating to finance, safeguarding, GDPR and health and safety.
- Support the preparation of information for audits, inspections and Governors.
- Liaise with the Local Authority and external agencies where required.
- Undertake additional duties appropriate to the role, as directed by the SBM or Head Teacher.

Please note that this is illustrative of the general nature and level of responsibility of the role. It is not a comprehensive list of all tasks that the teacher will carry out. The postholder may be required to do other duties appropriate to the level of the role, as directed by the headteacher or line manager.

Person Specification

Qualification	Essential <ul style="list-style-type: none">● Good standard of education, including GCSE (or equivalent) in English and Maths● Relevant administrative or business qualification <i>or</i> equivalent experience Desirable <ul style="list-style-type: none">● Finance or accounting qualification (e.g. AAT or equivalent)● First Aid qualification (or willingness to train)
Experience	Essential <ul style="list-style-type: none">● Experience of working in an administrative role within a busy environment● Experience of using IT systems for administration and data management Desirable <ul style="list-style-type: none">● Experience working in a school environment● Experience of financial administration (e.g. processing invoices, reconciliations, handling income)● Experience using school systems such as Bromcom, FMS or ParentMail● Experience supporting budget monitoring or financial reporting
Skills & Knowledge	Essential <ul style="list-style-type: none">● Strong organisational skills and ability to prioritise workload effectively● High level of accuracy and attention to detail, particularly in financial processes● Ability to maintain confidentiality and handle sensitive information appropriately● Good verbal and written communication skills● Proficient in the use of IT systems, including Google Workspace (Docs, Sheets, Drive, Gmail) and Microsoft Office● Ability to work independently and as part of a team

	<p>Desirable</p> <ul style="list-style-type: none"> ● Knowledge of school financial and administrative procedures ● Understanding of safeguarding, GDPR and compliance requirements in a school setting ● Experience of maintaining websites or communication platforms
<p>Personal Attributes</p>	<ul style="list-style-type: none"> ● Professional, calm and approachable manner ● Reliable, flexible and adaptable ● Strong interpersonal skills with the ability to build positive relationships ● Commitment to safeguarding and promoting the welfare of children ● Proactive approach with the ability to use initiative ● Commitment to continuous improvement and development

This job description may be amended at any time in consultation with the postholder