

DYSART SCHOOL JOB DESCRIPTION

Title : Finance & Data Coordinator

Grade : E20 – E25

Key Areas of Responsibility :

- To work as part of the administration team in supporting the school in attaining its aims and objectives by administering the finances of the school with the object of providing the most effective and efficient service to the school and the development of pupils.
- To ensure all financial services are handled in accordance with regulations to a high level of efficiency and where necessary, confidentiality.

Responsible to the Business & Operations Manager

Important Internal Relationships include:

Students Principal Vice Principal Assistant Principal Business & Operations Manager Office Staff
OHCAT staff Premises Team Head of Department Teaching & support staff Governing Body

Important External Relationships include:

Parents Local Authority Community & local schools Therapy Teams School Nurse Transport provider
Respite & After school care Social Services External suppliers of goods & services

Key Responsibilities

Finance Administration & Compliance

- **Purchase to Pay (P2P):** Prepare and raise requisitions and purchase orders on receipt of authorised requests; track approval status; record all supplier communications.
- **Goods Receipt:** Ensure all deliveries are checked and **GRN** (Goods Received Note) is recorded on the finance system promptly.
- **Invoice Control:** Match invoices to POs/GRNs, identify discrepancies, and promptly alert **central finance** of any invoices that should be held or queried.
- **Agency Spend:** Check agency invoices against daily staffing records and timesheets to ensure accuracy; resolve discrepancies with suppliers and central finance.
- **Procurement Card (GPC):** Maintain card logs, reconcile transactions, collect and file VAT receipts, and submit reconciliations to central finance within Trust timescales.
- **Staff Expenses:** Collate and verify staff expense/mileage claims, ensure correct approvals, coding, and timely submission to central finance.
- **Month-End Support:** Provide supporting schedules (e.g., accruals/prepayments requests, petty cash/GPC reconciliations, income logs) to central finance for month-end close.
- **Compliance:** Read and follow the **OHC\&AT Finance Policy** (including delegation/authorisation limits, procurement thresholds, value for money requirements) and the **Academy Trust Handbook** principles.
- **Audit Readiness:** Maintain orderly, complete records; support internal/external audits and respond to audit requests in a timely manner.

Income, Debt & Parent Payments

- **Online Payments (Arbor):** Manage the school's online payment system, maintain

products/accounts, and monitor arrears; notify the B\&OM of debts and pursue in line with **Trust debt-recovery guidelines**.

- **Parent Charging:** Issue half-termly requests for contributions (e.g., class funds, horse riding, trips/residentials), apply the **Charging & Remissions Policy**, and record all monies received.
- **Banking:** Prepare deposits of school income (donations, trips, catering, etc.) and pay into the school bank account or prepare for collection in line with Trust timelines; reconcile income to the ledger.
- **Sales Ledger Support:** Raise income/expenditure requests as needed (e.g., lettings, rental, reimbursements of pupil equipment), and respond to central sales ledger queries.

Funding & Grants (SEN Context)

- **Pupil Premium & Grants:** Maintain accurate records of **Pupil Premium Grant (PPG)** eligibility; share information with relevant staff; support tracking and reporting of PPG spend/impact.
- **Government Funding:** Assist in the administration of grants (e.g., **Sports Premium, 16–19 Bursary**), ensuring eligibility checks, evidence retention, and compliance with guidance.
- **SEN Top-Up/EHCP Funding:** Check pupil funding details monthly in the MIS; maintain documentation for top-up funding and liaise with **OHC\&AT** central teams to ensure accurate invoicing and adjustments.
- **Changes in Roll:** Notify central teams of pupil admissions/leavers/placements (and upload supporting documents), ensuring funding records remain accurate.
- **Procurement & Contract Management**
- **Quotes & Value for Money:** Obtain quotes for office-related equipment/services (e.g., copiers, telephony, IT) in line with Trust finance regulations; prepare **quotation waiver** forms when necessary.
- **Contracts Register:** Maintain and update the **contracts database** (terms, renewal dates, SLAs); work with central teams on procurement/compliance.
- **Stationery & Consumables:** Monitor stock levels to ensure teaching/admin resources remain readily available; manage reordering cycles.
- **Assets, Insurance & Vehicles**
- **Asset Register:** Coordinate asset tagging with Facilities/IT; ensure the inventory is accurate and updated; support **termly asset counts** with central finance.
- **Asset Disposal:** Arrange disposals with the B\&OM; record and notify central finance in line with Trust policy.
- **Insurance & RPA:** Maintain local insurance/RPA records; collate claim information and notify central teams of incidents/claims promptly.
- **School Vehicles:** Maintain a local summary of vehicles (insurance, tax, MOT, servicing); ensure compliance and notify central teams of any changes affecting cover. *(Note: motor vehicles require appropriate motor insurance in addition to RPA.)*

Data Management (MIS) & Statutory Returns

- **Core MIS (Arbor):** Maintain accurate pupil records (admissions, demographics, contacts, consent,

medical details, safeguarding flags, SEN status/EHCP, FSM eligibility).

- **Attendance:** Monitor attendance daily, ensure correct use of statutory codes for SEN contexts (e.g., hospital schooling, off-site provision), escalate concerns, and support DfE/Trust daily attendance returns (where applicable).
- **Behaviour & Exclusions:** Record incidents and exclusions accurately; produce reports for DSL/SENCO/SLT as required.
- **Timetabling & Groups:** Support curriculum setups, pastoral groupings, interventions/therapy schedules, and staff assignments within MIS.
- **Assessment & Progress:** Assist with data cycles (data entry windows, validations, pupil progress dashboards) and provide reports to teachers/SLT.
- **Census (DfE):** Compile and validate **School Census** (Autumn, Spring, Summer) and **Workforce Census**; run MIS validation/queries, resolve errors, and submit via COLLECT in line with deadlines; understand funding implications of census accuracy.
- **Data Quality & Reporting:** Run regular data-quality checks (duplicates, missing fields, code accuracy), produce KPI reports for SLT/governors, and respond to Trust MIS/data requests.
- **Liaison:** Work with the **MIS central team** to resolve queries, implement updates, and adopt trust-wide data standards.

Data Protection & GDPR

- **GDPR Compliance:** Maintain a tidy, safe, and GDPR-compliant office; protect confidentiality at all times.
- **Access & Retention:** Manage MIS access permissions in line with roles; follow Trust retention schedules for records.
- **SAR/FOI Support:** Log and coordinate responses to **Subject Access Requests** and **Freedom of Information** requests, liaising with the Trust **DPO**.

Reception & Front-of-House (as required)

- Greet visitors professionally, in line with the school's ethos and safeguarding procedures; ensure all visitors are signed in and wear badges.
- Answer and transfer calls courteously; take clear, accurate messages and deliver them promptly.
- Keep the reception/office environment welcoming, safe, and compliant.
- Show visitors/prospective parents around facilities when requested.
- Receive deliveries, date and sign delivery notes; ensure goods flow through to GRN and stock processes.

Audit, Governance & Continuous Improvement

- Support internal/external audits, governor/Trust reporting cycles, and implement recommended actions.
- Contribute to process improvements that strengthen internal controls, data quality, value for money, and service to pupils/families.

Training & Development

- Attend all whole-school **INSET** days, twilight sessions, and other training requested by SLT.
- Undertake role-specific CPD (finance systems, Arbor MIS, GDPR, safeguarding) and share learning with colleagues.

Stakeholder & Community (as required)

- Support **Friends of Dysart School (FODS)** finance tasks as directed by SLT (e.g., recording donations, reconciling events income, Gift Aid records), ensuring clear separation from school accounts.
- Maintain professional relationships and effective communication across the office team, teaching staff, families, governors, and Trust central teams.

General Duties, Safeguarding & Conduct

- Work in an organised, efficient manner; file documents promptly and accurately.
- Monitor shared mailboxes; forward/triage emails to relevant staff, especially in the **Office Admin Coordinator's** absence.
- Cover duties during absence of the **Office Admin Assistant**.
- Uphold **OHC\&AT** policies (Equal Opportunities, Health & Safety, Safeguarding/Child Protection); share the Trust's commitment to promoting the welfare of children and young people.
- Maintain a professional personal appearance consistent with the school's ethos and values.
- Follow the **School Handbook, Aims of the School, and Code of Conduct**.
- Maintain a tidy-desk policy in line with Trust guidelines.
- Undertake other duties commensurate with the role, as required by SLT.

Whole-School Responsibilities

- Participate in the school's **performance management** process.
- Play a full and active part in the life of the school.

Signatures :

The school will endeavour to make any necessary reasonable adjustments to the job and the working environment to enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.

This job description is current at the date below but will be reviewed on an annual basis and, following consultation with you, may be changed to reflect or anticipate changes in job requirements which are commensurate with the job title and grade in line with the school's changing needs.

Signed.....

Penny Jelbert

(Business & Operations Manager)

Signed

(Finance & Data CoOrdinator)

Date.....

Date.....

Person Specification – Finance & Data Coordinator

Essential Criteria	Desirable Criteria
Qualifications & Knowledge	Qualifications & Knowledge
<ul style="list-style-type: none"> • GCSE (or equivalent) English and Maths at grade C/4 or above. 	<ul style="list-style-type: none"> • AAT Level 2/3 or equivalent finance qualification.
<ul style="list-style-type: none"> • Good understanding of financial administration processes such as purchase-to-pay, invoicing, and reconciliations. 	<ul style="list-style-type: none"> • Knowledge of school finance procedures or Academy Trust Handbook principles.
<ul style="list-style-type: none"> • Understanding of GDPR, confidentiality and data protection requirements. 	<ul style="list-style-type: none"> • Understanding of SEN funding (e.g., Top Up, EHCP, PPG).
<ul style="list-style-type: none"> • Competent user of MS Office (Excel, Word, Outlook). 	<ul style="list-style-type: none"> • Knowledge of Arbor MIS or similar school management systems.
<ul style="list-style-type: none"> • Awareness of safeguarding responsibilities in a school environment. 	<ul style="list-style-type: none"> • Understanding of DfE Census processes.
Experience	Experience
<ul style="list-style-type: none"> • Experience in a financial or administrative role with responsibility for accuracy, record-keeping and compliance. 	<ul style="list-style-type: none"> • Experience working within a school office or educational setting.
<ul style="list-style-type: none"> • Experience reconciling transactions, processing invoices and managing supplier communications. 	<ul style="list-style-type: none"> • Experience supporting internal or external audits.
<ul style="list-style-type: none"> • Experience managing confidential information appropriately. 	<ul style="list-style-type: none"> • Experience administering grants or bursaries.
<ul style="list-style-type: none"> • Experience using databases or management information systems. 	<ul style="list-style-type: none"> • Experience producing data reports for senior leaders or governors.
Skills & Abilities	Skills & Abilities
<ul style="list-style-type: none"> • Excellent organisational skills; able to manage multiple tasks and meet deadlines. 	<ul style="list-style-type: none"> • Ability to identify areas for process improvement.
<ul style="list-style-type: none"> • High level of accuracy and attention to detail. 	<ul style="list-style-type: none"> • Ability to train or support colleagues in finance/data processes.
<ul style="list-style-type: none"> • Strong communication skills with staff, families, suppliers and external agencies. 	<ul style="list-style-type: none"> • Ability to analyse data trends and present findings clearly.
<ul style="list-style-type: none"> • Ability to work independently and as part of a team. 	<ul style="list-style-type: none"> • Ability to develop positive relationships across a wider Trust.
<ul style="list-style-type: none"> • Ability to maintain confidentiality and professional conduct at all times. 	
Personal Qualities	Personal Qualities
<ul style="list-style-type: none"> • Positive, professional, and solution-focused approach. 	<ul style="list-style-type: none"> • Interest in developing a career in school finance or data management.
<ul style="list-style-type: none"> • Commitment to safeguarding and promoting the welfare of children and young people. 	<ul style="list-style-type: none"> • Willingness to take on additional responsibility as the role evolves.

• Flexible and able to adapt to changing priorities within a busy school.	
• Commitment to continuous professional development.	
Other Requirements	Other Requirements
• Willingness to attend INSET, twilight training, and role-specific CPD.	• First aid qualification or willingness to train.
• Ability to represent the school professionally to visitors, families, and external partners.	