

Morecambe Bay Academy
Job Application
Finance Assistant



Morecambe Bay Academy

Welcome from the Headteacher



Dear Applicant,

I am writing to you on behalf of Morecambe Bay Academy, where I serve as Headteacher. I am thrilled to inform you that we are seeking to appoint an exceptional individual to the position of Finance Assistant.

As an Ofsted-rated "Good" school, we are on a continuous journey of school improvement, and we believe that the successful applicant for this role will play a crucial part in supporting our efforts. We are seeking a passionate and dedicated individual who shares our vision and values, and who is committed to helping our students reach their full potential.

We look forward to welcoming a candidate who is firmly committed to our ethos of creating a sense of belonging, an optimistic outlook that encourages and enables students to believe in their potential and a firm commitment to securing the very highest levels of achievement.

We believe that every student belongs, believes, and achieves, and we are committed to creating an inclusive and supportive environment where all can thrive.



Belong | Believe | Achieve

The Bay Learning Trust

Our Trust



If you share our passion for education and are ready to join our dedicated team, I encourage you to apply for this exciting opportunity. I look forward to receiving your application and the chance to discuss how you can contribute to the continued success of Morecambe Bay Academy.

Visits to the school are welcomed and encouraged. Please email Mrs Georgina Milce gmilce@morecambebayacademy.co.uk to arrange to visit and tour the school.

Sincerely

A handwritten signature in black ink that reads "JK Pardoe". The signature is written in a cursive style.

Jen Pardoe
Headteacher

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The Bay Learning Trust

Our Trust



The Trust was set up by Ripley St Thomas Church of England Academy in 2017. Ripley is a large Academy with over 1700 students, 400 of whom are in the Sixth Form. The Academy has been graded "Outstanding" in its last two Ofsted inspections. Ripley is a Teaching School and has its own SCITT (School Centred Initial Teaching Training), which was also graded "Outstanding" in 2017. It is also a National Support School.

In 2018 Carnforth High School joined the Trust family, who were then subsequently joined by Morecambe Bay Academy and Lancaster High School in 2019.

It has been very exciting to see the development of the Trust over the last eighteen months; we are now able to make a significant contribution to the education of young people in our local area. Our priority is to improve the quality of education in all our schools and so enhance the life chances of our young people. Equally importantly, we want to develop well-rounded and considerate students who will contribute to their local communities and make a positive difference wherever they are. An excellent education is about more than examination results!

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Morecambe Bay Academy

Our Vision and Values



Vision and values

Morecambe Bay Academy is where every student belongs, believes, and achieves. We are a thriving community school with a rich history of excellence and big heart. We are dedicated to inspiring and transforming the lives of our students.

Through relentlessly high expectations, excellent teaching, unwavering support, and a culture of hard work and independence, we empower our students to dream big, pursue academic and personal excellence, and make a lasting positive impact on the world around them. At Morecambe Bay, our students find joy in their regular accomplishments, build lasting friendships, and develop into kind, resilient, and compassionate individuals who are proud to call this school their own.

Belong

We are kind and compassionate

We are respectful

We are honest and trustworthy

Believe

We seek out new challenges

We are resilient and determined

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Morecambe Bay Academy

Job Description



JOB DESCRIPTION:	Finance Assistant
RESPONSIBLE TO:	School Business Manager
GRADE:	Grade 5 NPS 6-11
ANNUAL SALARY:	£25,989 -£28,142
ACTUAL SALARY:	£17,818 -£19,294
WEEKS WORKED:	30 hours, Term-time only—permanent position Mon-Fri 8.45am - 3.15pm
Closing Date:	9am Monday 9 February 2026
Interview:	W/C 23rd February 2026

Purpose of role

To assist with the financial and administrative function within school, with significant focus on maintaining accurate financial systems, records and procedures for the school. This includes dealing with correspondence or enquiries from staff, parents and pupils, co-ordinating, monitoring and updating financial administration/clerical activities and financial processes.

Finance Administration

- Receive and receipt all monies received into school – record on school finance system
- Assist the Finance Officer with the preparation of banking and accurately recording of all deposits in a timely manner ensuring banking is completed weekly
- Responsible for, along with another staff member, debt collection of dinner monies, trip payments, peripatetic music lessons and any other financial items raised on the school's finance systems producing reports as required
- Setting up of items on ParentPay, producing reports for the SBM and Trip Organiser to ensure effective management of trips
- Assist the Finance Officer with raising of orders/ processing invoices on the school's accounting system accurately and in a timely manner
- Liaising with suppliers and contractors to ensure timely delivery of goods

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Job Description



- Assist the Finance Officer with the preparation and distribution of Free School Meal vouchers
- Enter Petty Cash receipts to school finance system and assist in monthly reconciliation to bank statement
- Perform routine calculations to produce analysis and reports as requested
- Create, send, and follow up on invoices on the schools' finance system as required
- Collect and enter data for various financial spreadsheets
- Assist the Finance Officer to reconcile any discrepancies or errors identified by conversing with employees and/or parents/carers
- Manage stocks of supplies and consumables with the finance team
- Monitor budgets and report any issues to the SBM
- Adhere to the Trust financial policies and procedures
- Effective time management to ensure timely completion of all finance tasks.
- Assist pupils with dinner money and Free School Meal allowances

Lettings

- Assist the Finance Officer with the management and facilitation of school lettings
- Process and prepare financial statements from the letting's software as required
- Manage the lettings diary for the school.

General

- Be aware of and support difference and ensure equal opportunities for all
- Contribute to the overall ethos/work/aims of the school
- Participate in training and other learning activities and performance development as required
- Act in a manner which displays the utmost confidentiality and respect of pupil and staff records at all times
- To fully participate in the school's support staff appraisal scheme where appropriate.

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Job Description



As part of the school's support staff team the post may also be required to support with general office administrative tasks:

- Assist with the smooth running of the office
- Receive incoming phone calls/queries from parents and stakeholders
- Resolve queries and questions (liaising with relevant members of the school team for assistance as appropriate)
- Carry out general financial administrative duties, such as word processing, filing, printing and photocopying

In addition, other duties at no higher a responsibility level may be interchanged with/added to this list at any time.

You are expected to demonstrate a high level of professionalism and confidentiality at all times, be able to work under pressure and meet tight deadlines. They will be proficient at problem-solving and ideally have experience of developing their skills in a working environment.

Professional Development

You must be prepared to undertake any training as identified in the professional development interview.

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Safer Recruitment

The successful applicant will be subject to Disclosure and Barring Service clearance to ascertain their suitability to work with young people. The Bay Learning Trust is committed to safeguarding and promoting the welfare of children and young people and expects its entire staff to share this commitment. All post-holders will be required to have an Enhanced Disclosure from the Disclosure & Barring Service (DBS).

Equal Opportunities

We are committed to achieving equal opportunities in the way we deliver services to the community and in our employment arrangements. We expect all employees to understand and promote this policy in their work.

Health and Safety

All employees have a responsibility for their own health and safety and that of others when carrying out their duties and must help us to apply our general statement of health and safety policy.

Your duties should be discharged in such a manner as to maintain and develop the vision, principles and values of the Trust.

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Person Specification



Key Criteria	Essential	Desirable
Qualifications	GCSE Grade A-C (Maths and English) Experience of school systems	Finance/Accounting related qualifications
Experience	Previous finance/accounting and administration experience Experience with data and record management systems.	Evidence of successful team Working Previous experience of school software eg: SIMS Experience of using Sage accounting software Administration in an education setting
Knowledge	Excellent working knowledge including MS Office (Word, Excel, Outlook) Good organisation skills, ability to multi-task, prioritise effectively and work to tight deadlines	Knowledge of education, schools, academies Knowledge of working together to safeguard children. Working knowledge of relevant policies, procedures, codes of practice, and awareness of relevant legislation
Skills	Excellent interpersonal, oral and written communication skills Ability to work independently and as part of a small office team.	Advanced Excel and Word processing skills.

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Person Specification



Key Criteria	Essential	Desirable
Personal Qualities	<p>Able to work on own initiative and take responsibility for individual pieces of work</p> <p>Able to work effectively and sensitively with a wide range of People</p> <p>Keen attention to detail and Accuracy</p> <p>Highly confidential, committed & hard Working</p> <p>Flexible and responsive to change Commitment to Equality & Diversity</p> <p>Highly self-motivated and proactive</p> <p>Ability to work well within a team and follow instructions</p> <p>Highly organized with an energy, drive and flexibility to ensure a job is done well.</p>	

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