

**JOB DESCRIPTION**

Post title: Finance Assistant

Grade: Grade D

Responsible to: Finance Manager

Hours: 27.5 hrs per week, term time plus 20 days

9.00 am – 3.00 pm Monday to Friday

Overall Job Purpose: Under the guidance of Finance Manager be responsible for undertaking financial and administrative processes within the school, ensuring accounting records are accurately maintained and procedures adhered to. To provide financial and administrative support to the school.

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**1. Main Duties**

1. Deal with complex enquiries from staff, suppliers, students, parents and other outside agencies.
2. Contribute to the planning, development and organisation of financial systems/procedures/policies this includes order/invoice/payment processing procedures for the delegated budget and school fund account.
3. Manage manual and computerised financial information systems relating to the order and payment processing systems held in school.
4. Analyse and evaluate data/information and produce reports/information/data including: Monthly school fund, petty cash and statement reconciliations.
5. Assist with the planning, monitoring and evaluation of budgets, for example,

ensuring that departments stay within predetermined levels and notifying Head of Departments if these levels are exceeded.

1. Provide personal/administrative and organisational support to other staff including advice to staff to obtain ‘Best Value’ when purchasing items for departments or whole school.
2. Undertake administration of complex procedures including setting up online payments for trips and other items using MCAS.
3. Undertake the administration of the school finance system as appropriate including ordering, deliveries, invoices, petty cash, banking and some cheque processing. Undertake routine administration e.g. recharge against departments for office supplies, reprographic charges and any other chargeable items.
4. Ensure financial records are scanned and retained for Audit purposes and/or disposed/destroyed correctly within the given time limits.
5. Undertake research and obtain information to inform decisions.
6. Monitor expenditure within an agreed budget to ensure centrally held budgets stay within set expenditure limits.
7. Contribute to and be aware of the development of policies and procedures relating to child protection, health, safety and security, confidentiality and data protection, reporting all concerns to an appropriate person.
8. Contribute to the overall ethos/work/aims of the school.
9. Establish constructive relationships and communicate with other agencies/professionals.
10. Attend and participate in regular meetings.
11. Recognise own strengths and areas of expertise and use these to advise and support others.
12. The post holder may reasonably be expected to undertake other duties commensurate with the level of responsibility that may be allocated from time to time.

**2. Support for the School**

* To be aware of and comply with school policies and procedures relating to child protection, health, safety and security, confidentiality and data protection. Report all concerns to appropriate person.
* To undertake one break duty per week.
* To participate in training and other learning activities as required.
* To assist with the supervision of pupils out of directed time, including before and after school, if appropriate, and within working hours.
* To ensure that personal development is addressed through accessing appropriate development opportunities and to share learning with others.

**3. Competencies**

**Customer Care**

* To provide quality services that are what our customers want and need.
* To give customers the opportunity to comment or complain if they need to.
* To work with customers and do what needs to be done to meet their needs.
* To inform your manager about what customers say in relation to the services delivered.

**Develop oneself and others**

* To access development opportunities and share learning and experience with others in the Learning Support Team.

**Valuing Diversity**

* To accept everyone has a right to their distinct identity.
* To treat everyone with dignity and respect, and to ensure that what all our customers tell us is valued by reporting it back into the organisation.
* To be responsible for promoting and participating in the achievement of the departmental valuing diversity action plan.

**Whilst every effort has been made to explain the main duties and responsibilities of the post, each individual task undertaken may not be identified.**

The postholder may reasonably be expected to undertake other duties commensurate with the level of responsibility that may be allocated from time to time

**Prepared/revised by: Ms C. Molyneux, Headteacher, September 2025**

**Agreed by Postholder**: **Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PERSON SPECIFICATION**

Post title: **Finance Assistant**

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| **MINIMUM ESSENTIAL REQUIREMENTS** | **METHOD OF ASSESSMENT** |
| **SKILLS AND KNOWLEDGE** | |
| A sound knowledge of a range of computer applications | Application form/Interview |
| Effective and excellent communication skills both in writing and verbally | Application form/Interview |
| An understanding of the need for dealing with outside agencies in a professional manner and to treat the information they provide as confidential | Application form/Interview |
| Ability to work on own initiative and as part of a team | Application form/Interview |
| Ability to follow procedures | Application form/Interview |
| Ability to work and liaise with a wide cross-section of people, including young people | Application form/Interview |
| Ability to adapt own approaches in order to meet the needs of vulnerable or challenging young people | Application form/Interview |
| To have excellent organisational skills, allowing for prioritising of workload | Application form/Interview |
| **CUSTOMER CARE** | |
| Valuing diversity – listen, support and monitor the diverse contributions made to service development without prejudice. Challenge behaviours and processes which do not positively advance the diversity agenda whilst being prepared to accept feedback about own behaviour. Recognise people’s strengths, aspirations and abilities and help to develop their potential. Understand how valuing diversity can improve our ability to deliver better services and reduce disadvantage | Application form/Interview |
| **EXPERIENCE/QUALIFICATIONS/TRAINING ETC** | |
| GCSE English and Maths grade C or equivalent | Application form/Interview |
| Experience of financial administration using computerised systems | Application form/Interview |
| Willing to take part in own professional development and any identified training | Interview |
| **WORK-RELATED CIRCUMSTANCES** | |
| The ability to identify risk to self and others when undertaking work activities and appropriate actions needed to minimise risk | Interview |
| A policy of no smoking will apply | Interview |
| **DESIRABLE REQUIRMENTS** | **METHOD OF ASSESSMENT** |
| **SKILLS AND KNOWLEDGE** | |
| Knowledge of financial management systems and MIS | Application form/Interview |
| **EXPERIENCE/QUALIFICATIONS ETC** | |
| Previous financial experience. | Application form/Interview |
| AAT accounting qualification. | Application form /Interview/ Certificates |
| Previous experience of working in a secondary school setting | Application form/Interview |

**REVIEW ARRANGEMENTS**

The details contained in this Job Description reflect the content of the job at the date it was prepared. It should be remembered, however, that it is inevitable that over time, the nature of individual jobs will change, existing duties may no longer be required and other duties may be gained without changing the general nature of the duties or the level of responsibility entailed. Consequently Sharples School will expect to revise the Job Description from time to time and will consult with the post holder at the appropriate time.