

# Finance Assistant Application Pack



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THE  
COTSWOLD  
SCHOOL

Creating Brilliant Futures

# Welcome from Will Morgan, Headteacher

Thank you for your interest in this post.

Based in the stunning village of Bourton-on-the-Water, Gloucestershire, The Cotswold School has earned an 'Outstanding' reputation as a popular and successful 11-18 comprehensive academy.

Please watch our video, Welcome to The Cotswold School, to find out more from teachers and students about what makes our school an inclusive, ambitious and happy place to learn.

I am proud to lead an incredible team of staff, who go the extra mile to provide our students with an inspiring education, fully equipping them for their future lives. The values of friendship and knowledge, symbolised on our badge, underpin all our learning and development activities and ensure that the wellbeing of our students and staff is also cared for.

At the heart of our school ethos is a commitment to excellent teaching and aspiration, which drives progress and attainment. Our students thrive academically and also personally, with opportunities to take part in musical performances and a huge range of extra-curricular clubs; writing competitions and debates; community fundraising; student leadership; and careers events.

We have an inspiring and caring school community, which includes families, local businesses, our staff, PTA and, of course, our students. Why not have a look at our website News pages, to see how we have found ways to support ourselves and others and develop our learning and talents?

Successful candidates who are shortlisted for an interview will be contacted by email or phone.  
I look forward to hearing from you.

Will Morgan  
Headteacher



# Job advert

Role: Finance Assistant

Reports to: CFO

Contract: Full time, 37 hours per week, Mon-Fri, part-time also considered,

Term Time only plus 3 weeks during the summer holidays

Pay: Grade 4, Point 7 to Grade 5, point 12 of the NJC Local Government Pay Scale depending on experience (£26,403 to £28,598 FTE)

Closing Date: Tuesday 5<sup>th</sup> May 2026, 9am.

From 6<sup>th</sup> July we are seeking to appoint a committed and conscientious Finance Assistant to join a small, but integral Finance Team that is critical to the success of the financial management of the school. You will also be working proactively with the wider support team and teaching staff in a large and busy secondary school. This role will suit a reliable, enthusiastic, trustworthy and organised individual with the desire to learn and develop.

## WE ARE LOOKING FOR THE FOLLOWING SKILLS AND QUALITIES:

- The ability to work on your own initiative and prioritise your work
- To follow direction and work in collaboration with the CFO
- Have working knowledge of a financial software package
- Understanding of the importance of maintaining accurate financial records
- A good communicator and team player

## WE CAN OFFER YOU:

- The opportunity to be part of a dedicated team within a caring school environment
- Opportunities for professional development
- Option to join a pension scheme with generous employer contributions
- Employee benefits including an Employee Assistance Programme & Cycle to Work scheme
- A commitment to staff wellbeing
- Free onsite parking including electric car charging points

The candidate will contribute to the safeguarding and promotion of the welfare and personal care of the children and young people with regard to the Keeping Children safe in Education (KCSIE) guidelines and Area Child Protection Procedures.

The Cotswold School is committed to safeguarding and promoting the welfare of children and young people, and expects all staff, Governors, visitors and volunteers, to share the same commitment. This position is subject to an Enhanced DBS check.

# Job description

Job Title: Finance Assistant

Responsible to: CFO

## Overall Responsibility

Completing financial routines relating to orders, invoices, payments, income and expenditure. Undertaking general office and administrative duties as required.

Contribute to the safeguarding and promotion of the welfare and personal care of the children and young people with regard to the Keeping Children Safe in Education (KCSIE) guidelines and Area Child Protection Procedures.

## Job Outline - Operational

- Establish and maintain good relationships with students, parents/carers, colleagues, suppliers and contractors.
- Provide efficient finance and administration assistance to the CFO and wider Admin Team.
- Assist in maintaining and updating information held on school finance systems including recording expenditure and income, accessing and producing reports for budget holders
- Understand how to process orders ensuring sufficient funds are available beforehand.
- Process a high volume of purchase invoices, matching with orders where appropriate.
- Process payments, following required authorisation.
- Ensure the safe receipt, handling and banking of monies and cheques received.
- Create ParentMail payment items for approved school trips. Monitor associated income and issue payment reminders as necessary. Report on the surplus or loss of individual school trips.
- Liaise with suppliers, contractors, other schools and organisations, budget holders and attend to queries as required by her/his line manager.
- Reconcile supplier accounts on the finance system to supplier statements.
- Reconcile school credit card statements to the finance system.
- Issue invoices through the sales ledger, following up their prompt payment, as directed.
- Post journals as required.

## Administrative

- Ensure that all administrative duties, checks and documentation are completed to the required level of accuracy including returns and reports.
- Maintain both manual and computerised record and filing systems in line with audit requirements.
- Deal with correspondence promptly and as required including distribution of invoices received, payment queries, communications received from suppliers, contractors and the bank.
- Answer incoming and internal finance related calls, dealing with requests and enquiries and taking messages as required.

## Continuing Professional Development

- In conjunction with the line manager, take responsibility for personal professional development, keeping up-to-date with research and developments related to school efficiency, which may lead to improvements in the day-to-day running of the School.
- Undertake any necessary professional development as identified in the School Development Plan taking full advantage of any relevant training and development available
- Maintain a professional portfolio of evidence via SchooliP to support the Performance Management process - evaluating and improving own practice.

The Cotswold School is committed to safeguarding and promoting the welfare of children and young people, and expects all staff, Governors, visitors and volunteers, to share the same commitment.

This position is subject to an enhanced DBS check, satisfactory references and checks regarding suitability to work with children. This post is in regulated activity and is exempt from the Rehabilitation of Offenders Act 1974 (Exceptions Order 1975, amended 2013 & 2020).

The successful applicant will be subject to all necessary checks and be required to provide evidence of identity, right to work in the UK and professional qualifications (where relevant). In line with KCSIE 2025, we will conduct an online search for all shortlisted candidates. Any relevant information will be discussed further with the applicant during the recruitment process.

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

We are an equal opportunities employer and value and respect diversity across our whole school community. This job description will be reviewed annually and may be subject to amendment or modification at any time after consultation with the post holder. It is not a comprehensive statement of procedures and tasks but sets out the main expectations of the School in relation to the post holder's professional responsibilities and duties.

Elements of this job description and changes to it may be negotiated at the request of either the Headteacher or the incumbent of the post.

# Person specification

## Qualifications and Experience

### Essential

- Qualified to a minimum standard of GCSE grade C or 4 and above in english and mathematics
- Experience working in a busy office environment
- Previous finance/accounting and administration experience

### Desirable

- Experience of working in a school or similar establishment.
- Relevant accounting qualification eg AAT

## Knowledge and Skills

### Essential

- Ability to build and form good relationships with colleagues and students.
- Ability to work constructively as part of a team, understanding school roles and responsibilities including own.
- Verbal and written communication skills appropriate to the need to communicate effectively with colleagues, students and suppliers/contractors.
- Good standard of numeracy and literacy skills.
- Ability to proficiently use office computer and finance software including word-processing, spreadsheet, database and internet systems.
- Ability to maintain accurate records and filing systems.
- Ability to deal with confidential data/issues appropriately.

### Desirable

- Working knowledge of a financial software package. The school currently uses Access Dimensions accounts software, Hoge 100 Finance Portal and ParentMail.

## Personal Qualities

### Essential

- Initiative and ability to prioritise one's own work.
- Able to follow direction and work in collaboration with line manager.
- Able to work flexibly to meet deadlines and respond to unplanned situations.
- Efficient and meticulous in organisation.
- Honest and trustworthy.
- Desire to enhance and develop skills and knowledge through CPD.
- Commitment to the highest standards of child protection and safeguarding.
- Recognition of the importance of personal responsibility for health and safety.
- Commitment to the school's ethos, aims and its whole community.

### Evidence

Application form

Letter of Application

References

Interview

Certificate/s (to be available at interview)

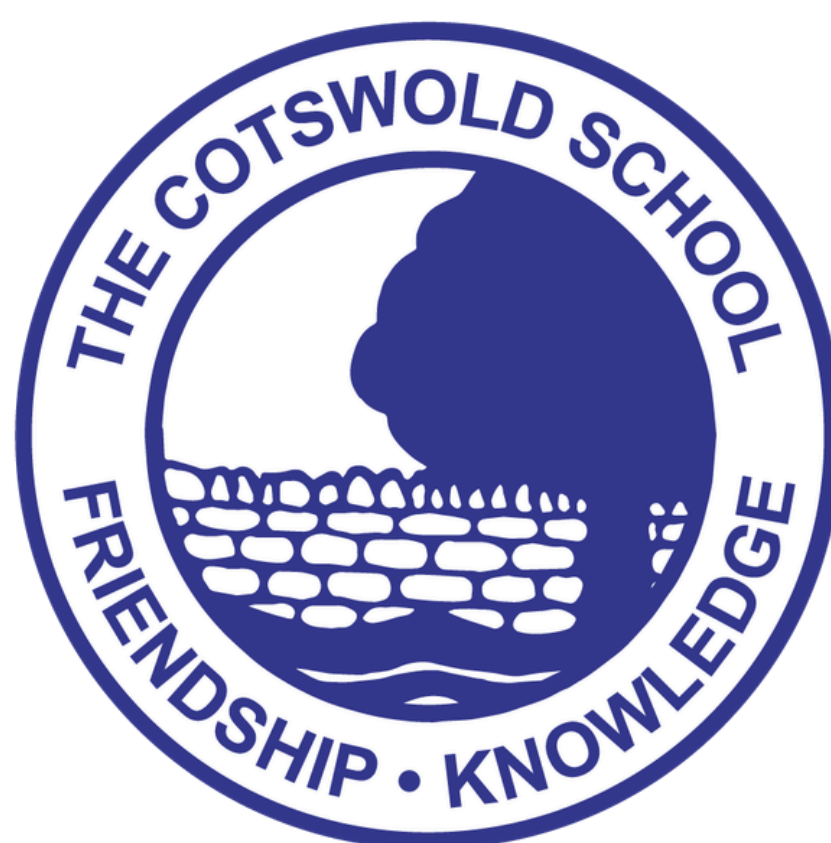
# Notes to applicants

- Please do not use the E-Teach or Gloucestershire County Council application form. Please use The Cotswold School Application Form which can be downloaded via our website
- Please complete the application form in full to ensure that full consideration can be given to all candidates and to comply with legal requirements relating to recruitment in schools
- Please do not include a CV or write 'see CV' in any sections on the form
- Please ensure that you include the title of the post that you are applying for (Section 1)
- Please provide an explanation for any gaps in chronological dates relating to education and employment history (Sections 4,5 & 6)
- If you are not writing a covering letter to submit with your application, then please complete Section 10, in full
- Please provide full details of two referees (Section 11)
- Both declarations (Sections 15 & 16) must be signed and dated
- Once completed, please return your application form by email to Mrs C Chapple, HR Officer, [cchapple@thecotswoldschool.co.uk](mailto:cchapple@thecotswoldschool.co.uk)
- If returning by post, please send to Mrs C Chapple, HR Officer, The Cotswold School, The Avenue, Bourton on the Water, Cheltenham, Gloucestershire GL54 2BD
- The closing date and time must be strictly adhered to
- All information given will be treated as confidential

The Cotswold School is committed to equality, diversity and inclusion and welcome applications from all sections of the community. If you require additional help with our recruitment process or details concerning the role please contact Mrs C Chapple, HR Officer (contact details above).







The Cotswold School  
The Avenue  
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