

Job Description for the Post of Finance Business Assistant

Department: Finance

Responsible to: Finance Business Manager

Line Management: None

Location: Multi Location

Job Purpose:

The Finance Business Assistant will deputise for the Finance Business Manager.

To carry out duties within the Finance Team specifically related to the categories of insurance, fixed assets and inventory. The Finance Business Assistant will support the management of organisational insurance, policies and fixed assets. This role ensures accurate record-keeping, assists with insurance renewals and claims, assists with asset tracking and audits, and contributes to compliance with relevant regulatory requirements. The ideal candidate is detail-oriented, organized, and capable of working with cross-functional teams. They will ensure records are kept up to date and providing an efficient reporting function for the schools and College centres working closely with the on-site and central teams. This includes Facilities, IT and local school finance staff.

Functional Links

The post holder will liaise with College and School staff, suppliers and public sector buying organisations (especially category leads) and other Trusts and maintain the high standards of the Trust. They will also be critical with regards to liaising with the insurance broker and underwriters.

Key Responsibilities:

Insurance Administration

- To deputise for the Finance Business Manager and in the FBM absence advise all employees on any insurance claims and aid them to report.
- Assist in the administration and renewal of all insurance and assist in the day to day running of insurance.
- Support the claims process, gathering necessary documentation and liaising with insurers and affected departments.
- Maintain an accurate register of all insurance and liaising with insurance and affected departments.
- Provide evidence of insurance coverage for excursions, contractors, and special events as required.
- Ensure insurance certificates are up-to-date and accessible to staff.
- Coordinate with internal departments to gather required insurance documentation.
- To ensure that all relevant equipment is insured in respect of engineering insurance. Working closely with schools and college centres.
- To ensure that the insurance is kept up to date for any amendments made in year. Particularly around vehicles. To ensure that vehicles remain compliant with regards to insurance
- To be a point of contact with regard to insurance and ensure all aspects are compliant.
- To assist in the training of staff where required to ensure accuracy and completeness of data and compliance of reporting insurance claims.
- To keep up to date with insurance webinars and documentation

Asset Management

- To be responsible for the oversight of the safeguarding of all asset and inventory trustwide.
- To oversee the trust assets and inventory system from a financial perspective and ensure data is up to date. To inform local personnel if data is missing
- Maintain and update the trusts asset management system and ensure data is up to date. To inform local personnel if data is missing.
- Coordinate the auditing of all physical assets across the estate. Monthly data review and reporting to ensure the asset system is kept up to date with regards to inventory and assets tagging

- Assist with periodic stocktakes and physical asset verification in line with audit and regulatory requirements.
- Assist in final disposals and transfers with the finance team. To ensure the central finance team are kept up to date on any disposals and to work with them to ensure fixed asset registers are kept up to date.
- Support internal audits and ensure asset-related policies are followed.
- Maintain the asset management system and asset register, ensuring all additions, disposals, and transfers are recorded accurately.
- Conduct regular physical asset verifications and support internal and external audits.
- To act as the coordinator for all disposals and to oversee the system to ensure all items are disposed on in a compliant way.
- Ensure all asset-related documentation is organized and accessible.
- To be aware of the safeguarding of all asset and inventory trust wide.
- Assistance with development of processes and procedures to ensure all statutory regulations are adhered to along with internal Finance Regulations and Procedures and bring to the attention of their line manager anything that is not in alignment.
- Monthly data review and reporting to ensure the asset system is kept up to date with regards to inventory and assets tagging.
- To ensure the central finance team are kept up to date on any disposals and to work with them to ensure fixed asset registers are kept up to date.
- To assist in the training of staff where required to ensure accuracy and completeness of data.
- To provide monthly and ad hoc reporting on all asset use to management and ESLT.
- To work with HR to ensure assets that are used by employees are logged and removed in a controlled way and safeguarded manner.
- Liaison with all levels of personnel.
- Assistance with development of processes and procedures to ensure all statutory regulations are adhered to along with internal Finance Regulations and Procedures and bring to the attention of their line manager anything that is not in alignment
- Such other duties as may reasonably be required

Other Duties

- To work both as part of a team or under minimum supervision
- Prioritise workload to achieve own and team goals
- To maintain information in a confidential manner following data protection regulations
- To alert line manager to any amendments required to ensure that financial regulations are being adhered to and any financial risks identified and reported effectively
- To maintain accurate accounting records in the performance of duties
- To demonstrate a commitment to safeguarding children and vulnerable adults
- To carry out all duties in accordance with OHCAT policies, including the Equality and Diversity Policy, safeguarding policies and Health and Safety Policy
- To carry out other such similar duties that may be reasonably required.
- Prepare reports, summaries, and presentations related to insurance and assets.
- Assist in developing and updating policies and procedures.
- Provide administrative support to the Finance Business Manager

Additional notes

- Job Descriptions are to be reviewed annually
- The responsibilities listed above are the essentials of the post; it is always open to the postholder to propose ways of extending these responsibilities

Person Specification for the Post of Finance Business Assistant

The Person Specification shows the abilities and skills you will need to carry out the duties in the Job Description. Shortlisting is carried out based on how well you meet the requirements of the Person Specification. You should mention any experience you have had which shows how you could meet these requirements when you fill in your Application Form. If you are selected for interview, you may be asked also to undertake practical tests to cover the skills and abilities shown below.

Area	Requirements	Essential/Desirable
Qualifications	GCSEs (or equivalent) in English and Maths (Grade C/4 or above).	Essential
	Training or certification in insurance administration or asset management.	Desirable
Experience	Experience working in a finance or administrative role.	Essential
	Experience maintaining accurate records and producing reports.	Essential
	Experience liaising with internal teams and external suppliers.	Essential
	Experience in insurance administration (renewals, claims).	Desirable
	Experience in asset management and inventory control.	Desirable
	Experience within an educational or public sector setting.	Desirable
Knowledge & Understanding	Understanding of financial processes and compliance requirements.	Essential
	Awareness of data protection and confidentiality regulations.	Essential
	Basic knowledge of insurance principles and asset management.	Essential
	Knowledge of public sector procurement and financial regulations.	Desirable
	Familiarity with SEND educational settings and safeguarding responsibilities.	Desirable
Skills & Abilities	Strong organisational and time-management skills.	Essential
	Excellent attention to detail and accuracy.	Essential
	Ability to prioritise workload and meet deadlines.	Essential
	Competent in Microsoft Office (Excel, Word) and finance systems.	Essential
	Effective communication skills (written and verbal).	Essential
	Ability to analyse data and produce clear reports.	Desirable
	Skilled in using asset management or insurance software.	Desirable
Personal Attributes	Professional, reliable, and discreet.	Essential
	Proactive and able to work independently as well as part of a team.	Essential
	Committed to safeguarding and equality.	Essential
	Flexible and adaptable to changing priorities.	Essential
	Positive attitude towards continuous improvement.	Desirable
	Willingness to undertake further training and development.	Desirable

Orchard Hill College & Academy Trust is proud to be a Disability Confident Employer, committed to creating an inclusive and supportive workplace for all.

Orchard Hill College & Academy Trust 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** and **Person Specification** is current 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.*

*In line with the statutory guidance in Keeping Children Safe in Education, the Trust reserves the right to request and review references **prior to interview** as part of our safer recruitment process. Any concerns raised will be followed up with the applicant before a recruitment decision is made.*