



May 2023

Dear Applicant

Re: Finance Officer

Many thanks for expressing an interest in the above position. I hope you find the enclosed Job Description, Employee Specification and following information useful in preparing your application.

Wetherby High School is a vibrant and welcoming school with inclusive values at the centre of all our work. We believe all our students deserve to have adults around them that are committed to doing all they can to help them succeed in all areas of life. Wetherby High School is in an exciting phase of development, with a new state of the art building for the school community that will be ready in the near future.

- Know our children well
- Character for achievement
- Partners in learning
- Enjoy and aspire

The staff at Wetherby High School work exceptionally well together as a team and this post is a key role in providing support to colleagues in a number of different roles. This is therefore a very exciting position that will appeal to an ambitious individual seeking a varied and interesting opportunity to utilise and develop key skills.

If you believe that you have the skills and attributes required of this role, please forward a covering letter outlining the reasons for applying for this position, a copy of your CV and Application Form, via email to [hr@wetherbyhigh.co.uk](mailto:hr@wetherbyhigh.co.uk)

Yours faithfully

A handwritten signature in black ink, appearing to read 'S. Jefferson', enclosed within a hand-drawn oval.

Samantha Jefferson  
Headteacher



## JOB DESCRIPTION

**Job Title:** Finance Officer

**Grade:** B3 (SCP7-11) / C1 (SCP12-17)

**Responsible To:** Finance Manager

## Purpose of job

To assist in providing a range of financial and administrative support within the school.

## Responsibilities

1. To carry out a range of routine financial support duties, in a timely manner, following financial regulations and keeping appropriate records; including but not limited to:
  - Raising purchase orders & ordering goods & services
  - Processing of invoices
  - Purchase card transactions
  - Virements & recharges
  - Administration of ParentPay
  - Petty cash processing & banking
  - ParentPay & Dinner Money
2. To provide routine finance advice, such as pricing, to budget holders.
3. To deal with enquiries from budget holders and suppliers.
4. To maintain accurate records (e.g. contracts register) and track progress of own work.
5. To produce and present routine reports to assist the Finance Manager and Headteacher with budget setting and monitoring.
6. To prioritise own work to meet conflicting deadlines.
7. To provide general administrative support, including reception duties.
8. To use IT applications and Databases effectively to deliver administrative tasks, particularly through the use of excel and word.
9. To input and retrieve data using computerised systems.
10. To collate and prepare information from a variety of sources.

11. To communicate effectively with internal & external customers and colleagues in relation to work undertaken.
12. To work with others to help improve work organisation and effectiveness.
13. To ensure promotion and support of Equal Opportunities and Health & Safety.
14. To be aware of and comply with policies and procedures relating to child protection, health, safety and security, confidentiality and data protection, reporting all concerns to an appropriate person.
15. To be aware of and support difference and ensure all students have equal access to opportunities to learn and develop.
16. To contribute to the overall ethos/work/aims of the school.
17. To appreciate and support the role of other professionals.
18. To attend relevant meetings as required.
19. To participate in training and other learning activities and performance development as required.
20. To provide and assist with hospitality requirements and where necessary.

General duties:

- To support school events and attend as required.
- To undertake ad hoc duties as may be required by the Headteacher and / or Senior Leadership Team from time to time, for example exam invigilation.
- To photocopy/scan documentation as required maintaining confidentiality at all times.
- To adhere to school policies and procedures.
- To fulfil the role of coach to a small group of students and participate fully in training.

**Any Special Conditions of Service:**

This school is committed to safeguarding and promoting the wellbeing of children and young people and expects all staff and volunteers to share this commitment. All staff will be subject to an Enhanced Disclosure and Barring check and satisfactory references.

There may be a need to occasionally work outside of school hours and off school premises, as required by the school. No smoking policy.

Signed (employee):

Date:

Signed (line manager)

Date:



## Personal Specification: Finance Officer

### REQUIREMENTS:

Certain aspects of the personal specification are essential, others are desirable. As indicated below.

E = Essential D = Desirable

Method Of Assessment (MOA) – A = Application Form T = Test I = Interview C = Certificate

SKILLS	E/D	MOA
Able to communicate effectively with a wide range of people including sensitive and complex information	E	A/I
Able to prioritise and plan own work to meet conflicting deadlines	E	A/I/T
Able to produce and present routine reports and data	E	A/I/T
Able to accurately enter/retrieve data information from information systems	E	A/I
Able to establish and maintain accurate records using both manual and electronic systems	E	A/I
Able to track own workload	E	A/I

KNOWLEDGE/QUALIFICATIONS	E/D	MOA
Knowledge of general office procedures and practice	E	A/I
Knowledge of relevant financial regulations to carry out financial transactions	E	A/I
NVQ Level 3/ 3 A-Levels or equivalent	D	C

EXPERIENCE	E/D	MOA
Experience of dealing with more complex queries from a wide range of people	E	A/I
Experience of working in partnership with others to deliver work to set deadlines	E	A/I
Experience of providing customer focussed services	E	A/I
Experience of participating in teams and using own initiative	E	A/I
Experience in the use of the Microsoft package	E	A/I/T
Experience of using financial packages	E	A/I
Experience of budgetary control	E	A/I
Experience of extracting and analysing data from information databases	D	A/I/T

BEHAVIOURAL AND OTHER RELATED CHARACTERISTICS	E/D	MOA
Willing to abide by the school's Equal Opportunities Policy in the duties of the post, and as an employee of the Council.	E	A/I
Willing to carry out all duties having regard to an employee's responsibility under the school's Health and Safety Policies	E	A/I
To display a responsible and co-operative attitude to working towards the achievement of the service area aims and objectives	E	A/I
An ability to respect sensitive and confidential work.	E	A/I
Commitment to own personal development and learning.	E	A/I

GENERAL
This school is committed to safeguarding and promoting the wellbeing of children and young people and expects all staff and volunteers to share this commitment. All staff will be subject to an Enhanced Disclosure and Barring check and satisfactory references.



## Privacy Notice for Applicants

### Data Protection Legislation

In accordance with UK data protection law individuals have the right to know what personal data we hold about them, and for what purpose.

The school is registered with the information Commissioners Office (ICO) under the provisions of the UK GDPR and Data Protection Act 2018. We take our responsibilities under data protection law very seriously.

This Privacy Notice explains how we collect, use, store and share personal data about job applicants. In data protection law, these activities are called data processing.

### What is this information?

We may collect some or all of the following information about you as part of our recruitment process:

- Name, address and contact details
- Application data and application history
- Education and employment details
- Gender, ethnicity, disability, sexual orientation and religion/belief
- Date of birth and national insurance number, Identification, Immigration and Asylum details, i.e. right to work in the UK
- References if you are invited to interview
- Right to work in the UK and supporting documentation if you are invited to interview
- Copies of qualifications if you are invited to interview

### Who uses this information?

People involved in the recruitment process for example, School Business Manager, Headteacher and Governors.

### What authority do we have to collect and use this information?

Under the GDPR we collect and use this information under powers given to schools for the legitimate interests of the controller or third party, where applicable.

The following categories of lawfulness apply:

- Processing is necessary for the performance of a contract with the data subject or to take steps to enter into a contract
- Processing is necessary for compliance with a legal obligation

- Processing is necessary for carrying out obligations under employment, social security or social protection law, or a collective agreement
- Processing is necessary for the establishment, exercise or defence of legal claims or where courts are acting in their judicial capacity

In rare circumstances where no legal authority exists to use your information, we will obtain your express consent first.

## What is 'personally identifiable data' (PII)?

The term PII relates to any data that could potentially identify a living person. The following fields in Human Resources are classified as PII: name, age, address, place of birth, date of birth, gender, national insurance number, any application data and any information about an individual that can be used directly, or in connection with other data, to identify, contact or locate that person.

## Why do we use this information?

We use this information in the course of recruiting members of staff.

## Who are we likely to share this information with?

We may sometimes share the information we have collected about you where it is necessary, lawful and fair to do so. In each case we will only share the minimum amount of information, for the following reasons:

With the local authority and our HR services provider to allow managers to manage recruitment processes.

## How do we keep this information secure?

Your information may be stored securely in electronic and paper document management systems with stringent limited access. All access to documents is limited to only those staff involved within the recruitment process.

## How long do we keep this information?

Documents are kept for a period of 6 months following the end of the recruitment process. If you are successfully appointed into a post, your data will be held in line with school policies. A copy of the staff privacy notice will be provided to you upon appointment with full details.

## What are your rights?

You have the right to request that we stop processing your personal data. Wherever possible, we will seek to comply with your request but we may need to hold or process information in connection with one or more of the school's legal functions.

If you have any questions about our use of this data, or you wish to request a copy of the information we hold about you, or you wish to discuss your rights in relation to opting out from these processes, please contact our **Data Protection Officer, Richard Lewis-Ogden** who can be contacted by email at [dpo@bywaterkent.co.uk](mailto:dpo@bywaterkent.co.uk).