

Job Description and Person Specification

The purpose of the Job Description and Person Specification is to provide information about the role and the skills a successful candidate must have.

Note for recruiting managers: If you are recruiting for an existing post, reuse the Job Description and Person Specification that already exists for the job.

Job details

Job title: Finance Assistant

Directorate: [School name - amend as appropriate]

Reporting to: Bursar

Grade: Scale 5

Job description

Purpose of the post:

- To administer and prepare all school accounts and to assist in the preparation of budgets. To provide support to the bursar in all financial and administrative functions.

Main duties and responsibilities:

- Administer the school budget on the school's local management system. Undertake regular reconciliation of SIMS and LAFIS accounts.
- Monitor expenditure and process invoices for payment. Raise and authorise payments to suppliers.
- Bank all school income including school fund. Ensure all income is accurately accounted for and receipts given for cash.
- Administer the petty cash account.
- Process orders and receive and distribute supplies.
- Maintain records for audit and prepare for audit visits.
- Administer the school fund and all related financial records.
- Administer supply and overtime claims and monitor absences. Support the Bursar in the daily administration of cover.
- Monitor and invoice all lettings of premises.
- Support the Bursar in the preparation of budgets.
- Assist the Bursar with the preparation of reports for the Governing Body.
- Carry out the above duties in accordance with the Education Department's equal opportunities policy.

This is a description of the main duties and responsibilities of the post at the date of production. The duties may change over time as requirements and circumstances change. The person in the post may also have to carry out other duties as may be necessary from time to time.

General
requirements:

- Take part in the school's performance management system.
 - Attend governing body meetings on a regular basis.
 - Enhanced CRB Check.
 - Strong commitment to furthering equalities in both service delivery and employment practice.
 - You must promote and safeguard the welfare of children, young and vulnerable people that you are responsible for or come into contact with.
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Job title: Finance Assistant

Person Specification

[To add extra rows, right-click in the last row and select Insert > Insert Rows Below...]

| | Essential | Desirable |
|--|-----------|-----------|
| Qualifications | | |
| 1. A recognised qualification in financial management or equivalent. | ✓ | |
| Experience | | |
| 2. Some experience of budget monitoring and account reconciliation. | ✓ | |
| 3. Experience of producing standard financial reports. | ✓ | |
| 4. Experience of undertaking a range of clerical and administrative duties, including data input and retrieval. | ✓ | |
| Knowledge | | |
| 5. A basic knowledge of the financial workings of a school. | ✓ | |
| 6. Some knowledge of budget management and accounting techniques. | ✓ | |
| 7. Knowledge of, or willingness to learn, a range of computer applications including financial management systems. | ✓ | |
| Skills | | |
| 8. Ability to work in an organised and methodical manner. | ✓ | |
| 9. Ability to maintain efficient record keeping systems. | ✓ | |
| 10. Ability to assist with the production of accurate records and reports as required. | ✓ | |
| 11. Ability to communicate with a range of audiences including other employees within the school, governors, pupils and parents. | ✓ | |
| 12. Ability to identify work priorities and manage own workload to meet deadlines whilst ensuring that lower priority work is kept up to date. | ✓ | |
| 13. Ability to show sensitivity and objectivity in dealing with confidential issues. | ✓ | |