CHAPEL GREEN SCHOOL

Job Title:	Finance Officer/Office Manager
Responsible to:	Headteacher and Governing Body
Grade:	Scale H 23-25
Reference:	GR2149/MJ2463
Terms and Conditions:	Hours – 35 hrs a week - 41 weeks a year, working hours by negotiation.

Main Purpose of the Role

To provide effective, efficient and professional financial, administrative and office management support to the school, ensuring that financial processes, school administration and day-to-day office functions are delivered to a high standard.

The postholder will play a key role in maintaining accurate financial records, supporting budget management and financial reporting, administering purchasing and payments, and ensuring that school administrative systems operate effectively.

Working within a **specialist maintained school for pupils aged 3–19 with moderate to severe additional needs**, the postholder will contribute to the smooth and safe running of the school and will understand the importance of providing a responsive, organised and inclusive service to pupils, families, staff, governors and external agencies.

The postholder will work collaboratively with the Headteacher, senior leadership team, governors, local authority and other stakeholders, while maintaining high standards of confidentiality, accuracy and professional conduct.

Roles and Responsibilities

1. Financial Management and Administration

- Maintain accurate and up-to-date financial records in accordance with school, local authority and statutory financial procedures.
- Process purchase orders, invoices, payments, receipts and other financial transactions.
- Monitor expenditure against delegated budgets and highlight significant variances or areas of concern to the appropriate budget holder.
- Assist with the preparation of regular budget monitoring reports for the Headteacher, senior leadership team and governing body.
- Maintain appropriate records of income and expenditure.
- Reconcile financial information, including bank accounts, credit cards and other school accounts as required.
- Process and monitor school income, including payments received from parents/carers, funding bodies and other sources.
- Support the administration of school trips, activities and other chargeable services.
- Monitor outstanding invoices and payments and follow up appropriately.
- Assist with year-end financial procedures, audits and preparation of documentation for the local authority or other relevant bodies.
- Ensure that financial documentation is appropriately authorised, recorded and securely retained.
- Provide financial information and advice to staff within the scope of the role.

- Support the Headteacher and budget holders in ensuring value for money in purchasing decisions.
- Assist with procurement and obtaining quotations in line with school and local authority procedures.
- Maintain appropriate supplier records and liaise with suppliers regarding invoices, orders and queries.
- Ensure that financial transactions comply with relevant school and local authority financial regulations.

2. Office Management

- Manage and coordinate the day-to-day operation of the school office, ensuring an efficient, welcoming and professional service.
- Organise and prioritise administrative tasks to meet the changing needs of the school.
- Coordinate office procedures and ensure that administrative systems are maintained effectively.
- Supervise and/or coordinate administrative staff where appropriate.
- Allocate office duties and ensure that work is completed accurately and within required timescales.
- Support the development and implementation of efficient administrative systems and procedures.
- Maintain appropriate filing and record-keeping systems, including electronic and paper records.
- Ensure that confidential information is handled appropriately and securely.
- Maintain appropriate school calendars, diaries and administrative schedules.

3. Pupil and Family Administration

- Support effective administrative arrangements relating to pupils from age 3–19.
- Maintain accurate pupil records and ensure information is updated promptly.
- Liaise professionally and sensitively with parents, carers and families.
- Handle enquiries from families, visitors and professionals in a calm, helpful and respectful manner.
- Recognise that families of pupils with additional needs may require particularly clear, sensitive and responsive communication.
- Liaise with external agencies and professionals when required, ensuring information is shared appropriately and confidentially.

4. Payroll Administration

- Maintain accurate records relating to staff salaries, hours, allowances, overtime, deductions and other payroll-related information.
- Check payroll reports for accuracy and investigate discrepancies or errors promptly.
- Ensure that payroll information is handled securely and confidentially in accordance with UK GDPR and school policies.
- Provide appropriate payroll information and assistance to the Headteacher and senior leadership team.
- Ensure that payroll-related financial records are reconciled appropriately with the school's accounting records.

5. Governance and Compliance

- Provide administrative and financial information required by the governing body and relevant committees.
- Support the preparation of reports and documentation for governors.
- Ensure that administrative and financial practices comply with relevant legislation, local authority procedures and school policies.
- Support the school in maintaining appropriate records for audit and inspection purposes.
- Assist with the preparation of documentation for external and internal audits.

- Maintain awareness of changes to relevant financial, administrative and educational requirements.

6. Data Protection and Confidentiality

- Maintain strict confidentiality at all times, particularly in relation to pupil, family, staff, financial and safeguarding information.
- Ensure that personal information is processed and stored in accordance with UK GDPR, the Data Protection Act 2018 and school policies.
- Use school information systems appropriately and securely.
- Ensure that confidential documentation is securely stored and disposed of in accordance with school procedures.
- Recognise the sensitive nature of information relating to pupils with additional needs and their families.

7. Communication and Customer Service

- Act as a professional and approachable point of contact for pupils, parents/carers, staff, governors, visitors and external organisations.
- Communicate clearly and sensitively with a wide range of people.
- Deal appropriately with confidential, sensitive or potentially challenging enquiries.
- Develop positive working relationships with colleagues and external partners.
- Ensure that communication reflects the school's inclusive ethos and values.

8. Safeguarding and Health & Safety

- Promote and uphold the safeguarding and welfare of children and young people.
- Follow the school's safeguarding procedures and report concerns promptly to the Designated Safeguarding Lead or appropriate member of staff.
- Maintain appropriate professional boundaries when dealing with pupils, families and external agencies.
- Comply with school health and safety procedures.
- Report hazards, accidents or concerns appropriately.
- Understand that safeguarding is everyone's responsibility within the school environment.
- Contribute to creating a safe, supportive and inclusive environment for pupils aged 3–19.

9. General Responsibilities

- Attend staff meetings, training and professional development activities as required.
- Keep knowledge and skills up to date and undertake relevant training.
- Work flexibly to meet the changing needs of the school.
- Support other administrative functions where reasonably required.
- Contribute positively to the school's ethos, values and continuous improvement.
- Undertake other duties appropriate to the grade and responsibilities of the post, as directed by the Headteacher.

Person Specification		
	Essential	**Desirable**
	Relevant qualification or demonstrable experience in finance, accounting, administration or office management. Good numeracy/literacy skills. GCSE (or equivalent) in Maths and English. AAT Level 3 or equivalent	Experience of working within a school, college, local authority or other public-sector environment.

	Experience of working in a finance or administrative environment. Experience of maintaining accurate financial and administrative records. Experience of using financial and/or accounting systems. Experience of using Microsoft Office, including Excel, Word and Outlook. Experience of managing confidential information. Experience of working independently and managing competing priorities. Experience of communicating with a wide range of people.	Experience of school financial systems and local authority financial procedures. Knowledge of maintained-school financial requirements. Experience of working with school management information systems. Experience of payroll and HR administration. Experience of supporting governors or governing bodies. Relevant finance/accounting qualification or willingness to undertake further professional development.
	Strong numerical and financial administration skills. Excellent attention to detail and accuracy. Good organisational and time-management skills. Ability to prioritise workload and meet deadlines. Ability to identify errors, discrepancies or potential financial issues. Good IT skills and confidence in learning new systems. Excellent written and verbal communication skills. Ability to maintain confidentiality and exercise sound judgement. Ability to work collaboratively as part of a multidisciplinary school team. Ability to remain calm and professional in a busy school environment.	High level of emotional intelligence to support the complex and layered roles within the admin team and school community
	Professional, approachable and reliable. Highly organised and methodical. Flexible and adaptable. Proactive and able to use initiative. Honest and trustworthy. Positive and solution-focused. Committed to equality, inclusion and the wellbeing of children and young people. Sensitive to the needs of pupils with moderate to severe additional needs and their families.	
	Good humour and positive attitude Emotional Intelligence Demonstrate and role model consistent professional attitude	

	Ability to relate well to children and adults Work constructively as part of a team, understanding school roles and responsibilities and your own position within these	

General Information

- The job description details the main outcomes required and should only be updated to reflect **major changes** that impact on the outcomes of the job
- All work performed/duties undertaken must be carried out in accordance with relevant County Council, department and school's policies and procedures, within legislation, and with regard to the needs of our customers and the diverse community we serve.
- Job holders will be expected to be flexible in their duties and carry out any other duties commensurate with the grade and falling within the general scope of the job, as requested by management.