

## Job Description & Person Specification

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|-----------------------|--|
| <b>EMPLOYEE NAME:</b> |  |
| <b>SIGNED:</b>        |  |
| <b>DATE:</b>          |  |

|                                    |                                                                                                                                                                                                                                                                                                                                                            |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job Title:</b>                  | <b>Finance &amp; HR Administrator</b>                                                                                                                                                                                                                                                                                                                      |
| <b>Grade:</b>                      | <b>H5.1 to H5.6</b>                                                                                                                                                                                                                                                                                                                                        |
| <b>Hours:</b>                      | 30 hours per week, 40 weeks per year (term time only plus inset days plus 1-week)                                                                                                                                                                                                                                                                          |
| <b>Based at:</b>                   | <b>Pinewood School, Ware, Hertfordshire</b>                                                                                                                                                                                                                                                                                                                |
| <b>Reports to:</b>                 | <b>School Business Manager</b>                                                                                                                                                                                                                                                                                                                             |
| <b>Responsible for:</b>            | No direct Linees                                                                                                                                                                                                                                                                                                                                           |
| <b>Liaison with:</b>               | <b>School Business Manager, senior leadership team, other staff and the Local Authority</b>                                                                                                                                                                                                                                                                |
| <b>Job Purpose:</b>                | To provide a full range of finance & varied HR administrative support to the school.                                                                                                                                                                                                                                                                       |
| <b>Principal Accountabilities:</b> | <ul style="list-style-type: none"> <li>• Maintain the school's accounting systems</li> <li>• Responsible for adherence to financial regulations and audit requirements and advising on the application of these</li> <li>• Provide administrative support to the HR function, ensuring accurate and confidential handling of staff information.</li> </ul> |

## **Job Description: Finance Assistant**

### **Health and Safety**

Be aware of and comply with policies and procedures relating to child protection, health, safety and security, confidentiality and data protection; and report all concerns to an appropriate person.

### **Key Responsibilities**

#### **Finance**

- Assist with the design and implementation of the school's financial procedures and systems
- Assist with the preparation/ prepare the draft annual budget and financial plans
- Maintain the school's accounting systems
- Undertake detailed monitoring of monthly expenditure, advising on the reason for an implication of variances and any recommendations
- Produce financial analysis and reports, including liaising and reporting to the Local Authority
- Manage petty cash and ensure appropriate use of the school's bank accounts
- Process orders and approve payments ensuring correct financial control is applied
- Reconcile accounts
- Responsible for adherence to financial regulations and audit requirements and advising on the application of these

### **Job Context**

- Finance roles fall within the schools' business and administration team who support the running of the school.
- Finance roles cover some broader administrative work but have a focus on finance related tasks, ranging from routine data entry transactional tasks to more strategic planning and management roles at higher grades.
- Responsibility for specified administrative duties requiring a degree of initiative.
- Communicates a range of financial information both verbally and in writing with the senior leadership team and other staff.

### **Dimension**

- The post is likely to be involved with the whole school budget but spend is likely to require authorisation from the Headteacher
- Responsible for the maintenance and updating of financial records
- Manage petty cash and assure appropriate use of the school's bank account
- Advise in relation to internal financial procedures
- Responsible for maintenance of school's financial procedures and systems
- Supporting administrative procedures within the HR department to assist the School Business Manager

### **HR administration**

- Provide administrative support to the HR function, ensuring accurate and confidential handling of staff information.
- Assist with recruitment processes, including posting vacancies, arranging interviews, and preparing appointment documentation.
- Support onboarding and off-boarding of staff, including maintaining personnel records and coordinating pre-employment checks.
- maintain and update HR systems and staff records in line with GDPR and school policies.
- Assist with absence monitoring, maintaining records and preparing reports as required.
- Support payroll processes by ensuring HR data (starters, leavers, contractual changes, absence) is accurate and up to date.
- Respond to routine HR queries from staff, escalating more complex issues as appropriate.

- Support the organisation of HR processes such as appraisals, training records, and mandatory compliance checks.
- Provide general administrative support to the SBM/HR Lead as required
- Undertake HR-related administrative duties as required to support the effective running of the school

### **Other Specific Duties**

Individuals in this role may also undertake some or all of the following:

- Undertake administrative duties, such as reception, filing, and document preparation.

### **Additional Information**

- Increasing expectation to engage in fuller professional development resulting from appraisal
- Increasing expectation to be able to take independent decisions
- To integrate into all areas of job accountability the actions and behaviours required to actively implement the Pinewood School's equal opportunities.
- The duties and responsibilities listed above describe the post as it is at present. The post holder is expected to accept any reasonable alterations that may from time to time be necessary.

### **Safeguarding and Review**

Pinewood School Academy Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. The successful candidate will be required to complete a Disclosure & Barring Service (DBS) application, medical checks and references.

This job description will be reviewed annually and may be subject to change 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 Trust in relation to the post-holder's professional responsibilities and duties.

## Person Specification: Finance Assistant

### Personal and Professional Conduct

The over-riding expectation is that employees and those engaged to work within PINEWOOD SCHOOL will adopt high standards of personal conduct, in order to maintain the confidence and respect of their colleagues, pupils or students, the public in general and, indeed, all those with whom they work or come into contact within the course of their employment or engagement by the individual school.

E = Essential    D = Desirable

| Education                                                                                                                                                                                                                      | E | D |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|
| Requires knowledge of accounting and financial procedures sufficient to be able to maintain accounts, produce financial reports, advise on variances equivalent to national qualifications level 4 (Desired but not essential) |   | ✓ |
| Experience                                                                                                                                                                                                                     |   |   |
| Experience of working in a finance role.                                                                                                                                                                                       | ✓ |   |
| Skills, abilities and knowledge                                                                                                                                                                                                |   |   |
| Contributes to design and implementation of financial procedures; carries out tasks, requiring analytical skills such as processing orders and payments, financial monitoring and reporting, assisting with budget preparation |   | ✓ |
| Keyboard skills, applied with precision and speed                                                                                                                                                                              | ✓ |   |
| Communicates a range of financial information both verbally and in writing with the senior leadership team and other staff                                                                                                     | ✓ |   |
| Personal qualities                                                                                                                                                                                                             |   |   |
| Responsibility for specified administrative duties requiring a degree of initiative.                                                                                                                                           | ✓ |   |
| Increasing expectation to engage in fuller professional development resulting from appraisal                                                                                                                                   | ✓ |   |
| Increasing expectation to be able to take independent decisions                                                                                                                                                                | ✓ |   |
| To integrate into all areas of job accountability the actions and behaviours required to actively implement the Pinewood School's equal opportunities.                                                                         | ✓ |   |