# BENCHMARK JOB DESCRIPTION

JOB FAMILY: ADMINISTRATION/FINANCE/BUSINESS MANAGEMENT

LEVEL: B

JOB ID: 02AA

GRADE: 3

## LEVEL DESCRIPTION

All duties will be carried out within recognised procedures or guidelines. The post holder will need to have knowledge of a range of organisation policies and procedures.

May include ad hoc duties, which require some initiative.

Will make day-to-day decisions about own workload, within a clear framework.

There will be some need to interpret information or situations to solve problems.

There may be some need to use analytical, judgemental, creative and developmental skills.

Administrator or Manager is available for direction and guidance.

## INTRODUCTION

The level description gives an overview of the level of competence required to carry out work at this level.

Each school is organised differently, and the range of duties carried out at this level will be different in each school. Some jobs may carry out a diverse range of duties whilst others may be engaged on a narrower range of tasks.

The next section of this benchmark job description will give examples of the types of work that may be carried out at this level. This list is not exhaustive and is intended to give a flavour to help schools to assimilate jobs to the appropriate level.

## EXAMPLES OF DUTIES AT THIS LEVEL

* Undertake a number of duties associated with providing support to the Headteacher/Senior staff, for example:
* Act as first point of contact for Headteacher/Management Team, including telephone enquires, receiving visitors, arranging hospitality and dealing with mail
* Undertake or oversee a range of word processing and clerical duties for the Headteacher, other staff and Management Team
* Generate routine correspondence
* From information received, set up appropriate allocations on the school’s management system (Arbor and or ParentPay), record and monitor income and expenditure against headings eg clubs or lunches and produce reports for Headteacher/senior managers as required
* Receive and process monies/income/invoices, including processing cash/cheques and issue of receipts
* Account for petty cash in accordance with procedures
* Maintain school records including online registers and pupil files
* Ensure that deadlines are met
* Maintain pupil and staff records, including class lists, support of school trips making travel bookings etc.
* Making contact with familes for queries such as absences, meal choices, queries related to breakfast or after school clubs.
* Undertake administration for school lettings including liaison with related staff

The duties listed above are examples of duties at this level and other duties of a similar level/nature may be undertaken by individuals and are not excluded simply because they are not itemised.

# PERSON SPECIFICATION

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| **Criteria** | **Essential to basic performance of job** | **Required for fully competent performance of job** |
| **Knowledge:** |
| Technical or specialist | * RSA II, or equivalent.
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|  | * Demonstrable experience in a range of office/financial procedures.
 | * Knowledge of computer systems e.g. MS Office products and experience of Arbor or ParentPay
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| Literacy and numeracy | * Ability to collect monies and maintain accounts for school activities, e.g. dinner money.
 | * Ability to use school’s computerised financial management system (Arbor)
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|  | * Literacy needed for maintaining records and producing a range of correspondence.
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| Organisational |  | * Knowledge of the school’s financial procedures, e.g. banking.
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|  |  | * Knowledge of basic health and safety and responsibilities.
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|  |  | * Good understanding of school structure.
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|  |  | * Knowledge of policies and procedures, e.g. sickness and absence records procedure.
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|  | Knowledge of administrative procedures, e.g. ordering, incoming/outgoing post. |  |

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| **Criteria** | **Essential to basic performance of job** | **Required for fully competent performance of job** |
| Knowledge & use of equipment | * Ability to use/operate general office equipment, including reprographic, binding, audio typing or work-processing etc.
 | * Knowledge of audiovisual equipment where appropriate.
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| * Knowledge of school establishment’s computerised systems, may include specialised software, e.g. CPoms, Arbor, etc.
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| Any other (incl. Political) |  | * Broad understanding of Government initiatives and their impact on the school, e.g. Local Management of Schools.
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| **Mental Skills:** |
| Research | * Prepare financial information for line manager/Area/ Headquarters.
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| Problem solving | * Identify variations from accepted patterns or missing documentation or other unusual aspects and refer them to line manager.
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|  | * Carry out checks on stock deliveries and refer any queries to suppliers or line manager as appropriate.
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| Thinking creatively / Developing new ideas | * Contribute to the production of materials, e.g. lay out of year books/staff handbooks etc.
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| Planning ahead | * Ensure routine and non-routine correspondence is produced on time.
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|  | * Assist in the preparation for school activities e.g. sports day
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|  | * Ensure work allocated to the team meets deadlines.
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| **Criteria** | **Essential to basic performance of job** | **Required for fully competent performance of job** |
| **Interpersonal & Communications Skills:** |
| Caring skills | * Attend to sick/injured pupils, make arrangements as required.
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| Training and / or presentation skills |  | May assist/contribute to induction training for new administrative/finance staff |

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| Advising / guiding skills | * Provide advice and guidance to administrative/finance staff on range of issues, e.g. administrative procedures & work allocation.
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|  | * May be required to informally advise teaching staff on administrative procedures, e.g. travel claims process.
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| Negotiating, influencing or conciliating skills | * May be required to influence or conciliate between administrative/finance staff.
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| Verbal and written communications skills (including use of languages) | * Make and receive telephone calls, answer queries or refer to line manager as required.
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|  | * Maintain a range of records, e.g. travel/expenses claims, class lists & pupil records, some of which may be confidential.
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| **Physical skills:** |
| Keyboard skills / use of mouse | * Keyboard and mouse skills are required to undertake a range of tasks, such as the production of reports, routine and non-routine correspondence etc.
 | * Ability to use school admin/finance systems with precision.
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| **Criteria** | **Essential to basic performance of job** | **Required for fully competent performance of job** |
| **Other attributes:** |
| Level of autonomy | * The post holder will be expected to make day-to-day decisions about own workload and the workload of administrative/finance staff, where appropriate.
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|  | * May include semi-routine tasks requiring some initiative.
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|  | * The work is covered by guidelines and procedures.
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# EVALUATION NOTES

## KNOWLEDGE

* It is essential that the post holder has good literacy and numeracy skills to undertake a range of tasks, e.g. minute taking, maintaining school online diary, daily registers, checking travel, managing emails.
* Knowledge of a range of school procedures is needed to carry out the variety of duties. These are likely to include financial, health and safety and administrative policies and procedures. It is expected that the post holder would have a broad overview, gained from office experience and/or qualifications, specific procedures could be learnt in post.
* It is essential that the post holder has a broad knowledge of equipment, e.g. reprographics, audio typing and/or software package, e.g. Word, Excel. More in-depth knowledge for e.g. specific software packages could be obtained on the job as necessary.
* Experience of overseeing/supervising staff may be required.

## MENTAL SKILLS

* Some analytical skills required e.g. resolving discrepancies between financial records.
* The post holder will undertake short term planning, e.g. managing own workload, ensuring deadlines are met, planning for school activities e.g. school trips/sports day.
* The post holder is likely to be the first point of contact for customer complaints. The post holder will deal with the less complex, deciding when to refer on to more senior staff.

## INTERPERSONAL AND COMMUNICATIONS

* The post holder will communicate with range of visitors, staff and pupils within the school, passing information/messages onto others some of which may be confidential and sensitive.
* The post holder needs to be able to communicately appropriately with pupils, according to their age, for straightforward advice on first aid.
* The post holder may advise and guide others on organisational procedures, e.g. administrative/finance staff on administrative procedures, parents on sick child or school events, teaching staff on expenses procedures.

## PHYSICAL SKILLS

* Ability to use keyboard and mouse to produce accurate records, may include the production of reports, correspondence, inputting/updating personnel or financial information etc.
* Work accurately with attention to detail.

## INITIATIVE AND INDEPENDENCE

* Majority of the work is covered by recognised procedures but with some scope for decision making.
* Manager may be less readily available than at Level A.
* Prioritise own work and, if supervising, that of others.

## PHYSICAL DEMANDS

* Minimal physical demands.

## MENTAL DEMANDS

* The post holder will be expected to switch between tasks during the course of the working day.
* It is likely there will be interruptions from staff and pupils.
* There will be tasks that require alertness and concentration, such as, counting dinner money, producing financial information, minute taking and drafting correspondence.

## EMOTIONAL DEMANDS

* The post holder may be required to attend to sick and injured pupils and make appropriate arrangements.

## RESPONSIBILITY FOR PEOPLE

* The post holder assists in providing or supervising a front line service to visitors to the school. This will require an awareness of own customer care skills and those of administrative/finance staff.

## RESPONSIBILITY FOR SUPERVISION (EMPLOYEES)

* The post holder may supervise administrative staff. This may include overseeing their workload, establishing work programmes and assisting in induction training.

## RESPONSIBILITY FOR FINANCIAL RESOURCES

* The post holder may collect, process and record cash amounts, such as, dinner monies, sale of tickets, supplies.
* Certain financial tasks may require the post holder to account for monies, e.g. when checking parental payment statements, maintaining financial records etc.

## RESPONSIBILITY FOR PHYSICAL RESOURCES

* May include responsibility for keys to school and safe and the ordering of stationery.
* Responsible for updating computerised system, including security of data.
* Careful use of office equipment.

## WORKING CONDITIONS

* Office-based.