



BENCHMARK JOB DESCRIPTION

JOB FAMILY:	ADMINISTRATION/FINANCE/BUSINESS MANAGEMENT
LEVEL:	D
JOB ID:	07AA
GRADE:	5

LEVEL DESCRIPTION

This is a senior level post and is likely to only be found in a large middle school or in a high/upper school.

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

May include ad hoc duties, which require initiative.

The post holder will undertake a range of tasks, which require theoretical, practical and procedural knowledge across a technical or specialist area or in an equivalent level of organisational, procedural and policy knowledge.

The post holder will be expected to respond independently to unanticipated problems and situations.

The job requires analytical and judgmental or creative and development skills to analyse and interpret complex information or situations and to solve difficult problems or develop solutions or plans over the medium term (several months, up to a year).

Exchanges complicated or sensitive information orally or in writing with a range of audiences.

Demonstrate sensitivity and tact in contentious situations.

The post holder will organise own workload and will have direct responsibility for the supervision, co-ordination, direction or training of other employees.

Manager is available for advice and guidance on serious problems.

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

Management of Staff

- Ensure recruitment and selection procedures are followed and provide relevant information to the Area Office in order for appointment documentation to be issued.
- Undertake the day-to-day management of administrative/finance staff, including the establishment of work programmes, setting work priorities and resolving problems as required.
- Monitor work performance, identify staff training needs, evaluate the effectiveness of training and keep accurate records. Carry out induction and performance reviews.

Financial Responsibilities

- Preparing the school budget plan in conjunction with line manager/senior staff advising on the detailed construction.
- Designing and setting up appropriate systems for monitoring income, expenditure, cash flows and deposits, in accordance with Suffolk County Council financial procedures.
- Producing and presenting reports for Headteacher and Governors, interpreting information for non-specialists.
- Reconciling of financial records with bank statements and computerised printouts. Bringing any significant anomalies/discrepancies to the attention of line manager.
- Preparing, or overseeing the preparation of, financial statements, commitment accounts and any other financial activities within the school, devising financial systems to meet the local needs when necessary.
- Acting as authorising officer for financial documentation.
- Participating in working groups.

School Administration

- Overseeing ordering procedures and purchasing of supplies/materials/services ensuring levels are maintained.
- Ensuring all appropriate licences/insurances are obtained for the school.
- Arranging cover during teaching staff absence, processing necessary paperwork.
- Promoting and authorising external lettings of the school's premises.
- Attending and contributing to Governor meetings.
- Overseeing the administrative procedures relating to school meals, transport etc.
- Keeping operating procedures under review to identify areas of potential development and/or improvement and make recommendations.
- Ensuring that all administrative activities are carried out in accordance with school policy and procedure.
- Providing or overseeing secretarial services for the Headteacher, including maintaining confidential records, diary keeping and assisting visitors as required.

Premises Management

- Carrying out periodic inspections, ensuring inventory checks are undertaken and appropriate records of furniture/equipment are maintained, authorising repair/replacement as necessary.
- Ensuring that regular inspections of buildings and grounds are undertaken and approve any maintenance.
- Liaising with other departments/agencies with regard to maintenance/repairs/cleaning, ensuring that all works are within budget and to satisfactory work standards.

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

Criteria	Essential to basic performance of job	Required for fully competent performance of job
Knowledge:		
Technical or specialist	• Relevant qualification such as NVQ4, HNC/D or degree, or equivalent knowledge. • RSA II or equivalent. • Experience of managing a team of staff, ideally across different work areas. • Experience in an administrative and/ or financial environment. • Good understanding of financial regulations.	• Management qualification or equivalent e.g. NVQ 4 Certificate in Management.
English and Maths	• Ability to prepare a range of financial information/documents/ invoices, including those for external agencies. • Ability to write reports. • Understanding a range of organisational and financial procedures, and the ability to disseminate to other staff. • Ability to analyse, monitor and evaluate and make recommendations on financial information.	

Criteria	Essential to basic performance of job	Required for fully competent performance of job
Organisational	Knowledge of a range of school's procedures, e.g. financial management and health and safety.	- Good understanding of the school structure. - Broad knowledge of the organisation of the LEA. - Understanding of Governors' role, responsibilities, committees and decision-making powers. - Knowledge of First Aid procedure and relevant paperwork. (Training provided by school)
Knowledge & use of equipment	- Ability to use general office equipment. - Experience of spreadsheets and word processing. - Ability to design and set up spreadsheets/databases.	Knowledge of school's computerised systems, may include specialised software, e.g. iTrent, Arbor...
Any other (incl. Political)		Good understanding of current legislation and its impact on the school.

Mental Skills:

Research	Ability to analyse, monitor and evaluate, advise on and make recommendations on financial information and school's policies.
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Criteria	Essential to basic performance of job	Required for fully competent performance of job
	• Check and reconcile expenditure and income information on the computerised system against financial printouts. • Prepare financial information for a range of external agencies, e.g. auditors, tax office, SFVS. • Preparation of annual estimates of expenditure, preparation of the annual budget and monitoring of expenditure.	
Problem solving	• Identify potential difficulties/issues, analyse them and make recommendations. • Identify anomalies and discrepancies and refer significant ones to line manager.	
Thinking creatively / Developing new ideas	• Design, set up and maintain records, systems and procedures relating to all school accounts, in line with SCC standards and regulations. • Devise training programmes for staff.	
Planning ahead	• Ensure financial deadlines are met through overseeing the completion and return of necessary documents. • Allocation of staff workloads, prioritisation of work.	

Criteria	Essential to basic performance of job	Required for fully competent performance of job
	Assist in the preparation and planning of financial information over months up to one year, e.g. annual expenditure/ budget/ staff work programmes.	
Interpersonal & Communications Skills:		
Training and / or presentation skills	- Present information at meetings for budgetary decision. - Carry out induction training, in-house training for administrative/finance staff.	
Advising / guiding skills	- Advise and guide administrative/finance staff on range of issues. - Advise and guide line manager/senior staff on significant discrepancies etc. - Advise teaching staff on procedures, e.g. budget monitoring claims and first aid. - Needs excellent communication skills with staff at all levels, providing detailed information and resolving typically complex problems. - Expected to handle highly confidential information with tact, diplomacy and sensitivity.	

Criteria	Essential to basic performance of job	Required for fully competent performance of job
Negotiating, influencing or conciliating skills	- Undertake negotiations and attempt to influence other agencies or departments re: services/supplies. - Conciliate between staff members/parents/teaching staff and team members.	
Verbal and written communications skills (including use of languages)	- Contribute to the writing of appropriate school policies. - Produce reports for Headteacher/Governors. - Make and receive telephone calls, answer complex and technical queries. - Liaise with others both inside and external to the school.	
Physical skills:		
Keyboard skills / use of mouse	Keyboard and mouse skills are required to undertake a range of tasks, e.g. the production of reports, maintaining financial records, designing spreadsheets and systems.	
Other attributes:		
Level of autonomy	Manages own workload and work of team to ensure financial deadlines are met through the completion and return of necessary documents.	

Criteria	Essential to basic performance of job	Required for fully competent performance of job
	• Within SCC policies and procedures the post holder makes a range of decisions on operational issues, allocation of work to team, ordering supplies etc. • The post holder provides information to enable Governors and Headteacher to make budgetary decisions, address spending issues and undertake financial forecasting. • Includes largely non-routine tasks requiring personal initiative.	

EVALUATION NOTES

KNOWLEDGE

- The post holder needs a range of up to date technical and specialist knowledge and experience in the following areas: managing staff across different work areas, financial policies, procedures and systems and an awareness of current personnel practices. The post holder will advise, guide and make recommendations to the Headteacher and Governors on a range of issues affecting the school, e.g. government grants/applications, training opportunities, non-teaching staff structure etc.
- The post holder is expected to carry out a range of complex written communications requiring good literacy and numerical skills and knowledge, e.g. writing financial reports for external sources, contributing to the development and review of relevant school policies and procedures, budget monitoring and planning, personnel records, applying for government funding etc.
- It is essential that the post holder has a broad knowledge of software packages, e.g. Word, Excel. More in-depth knowledge for e.g. specific software packages, could be obtained on the job as necessary.

MENTAL SKILLS

- The post holder will use research, judgmental and developmental skills for many tasks, e.g. designing and setting up appropriate systems for monitoring income, expenditure and cash flow or when ensuring that new employee details are correctly recorded and sent to the Area Office.
- The post holder will undertake short term planning, e.g. managing own workload and overseeing work of others, ensuring deadlines are met etc.
- The post holder will undertake medium term planning, for e.g. recruitment and selection, monitoring performance of staff etc. This could involve planning for increase in workloads and the need for extra staff.
- The post holder will contribute to long term planning, e.g. in the area of financial forecasting, budget distribution, staff retention and school needs for non-teaching staff in terms of pupil numbers etc.

INTERPERSONAL AND COMMUNICATIONS

- The post holder will carry out and/or oversee a range of written communication tasks including the production of financial forecasts; income, expenditure, cash flow projections; budget control documents and the production of statistics/financial documentation for external sources. Much of the material the post holder handles will be of a sensitive and confidential nature with serious implications should it be incorrect, e.g. financial forecasting and budgetary information.

- Post holder will communicate with range of visitors, staff, Governors and children within the school, often on behalf of the Headteacher and deal with the more sensitive/confidential issues. The post holder will offer advice and guidance to senior staff/Headteacher/Governors on technical and specialist financial information and influence school policy on such matters.

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

The post holder is likely to make decisions in the following areas:

- Setting of work programmes, including priority and scheduling of work for administrative/finance staff.
- Purchasing services and supplies.
- Contributing to the setting of budgets and financial forecasting.
- Influencing the development of school policy through participation at management meetings.

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, on occasion, pupils.
- There will be tasks that require alertness and concentration, e.g. producing financial reports and forecasts, presenting information and carrying out training exercises at Governor meetings.
- There will be some work related pressure in meeting external deadlines, e.g. Ofsted requirements, ensuring school financial information is up to date for auditors, ensuring systems devised meet national targets/requirements etc.

EMOTIONAL DEMANDS

- Minimal emotional demands.

RESPONSIBILITY FOR PEOPLE

- The post holder manages a front line service to visitors offered by administrative/finance staff. This requires an awareness of their own customer care skills and those of others.

RESPONSIBILITY FOR SUPERVISION (EMPLOYEES)

- The post holder directly manages administrative/finance and, possibly caretaking staff, across their different work areas, managing workloads, setting priorities and carrying out performance reviews etc.

RESPONSIBILITY FOR FINANCIAL RESOURCES

- The post holder is responsible for a range of financial and administrative tasks.
- There is responsibility for monitoring expenditure from budgets not held by the post holder, i.e. accounting for monies, in ensuring effective budgetary control for the school.
- The post holder supports the budget setting process and setting the annual budget plan, including its detailed construction.
- The post holder is likely to have direct responsibility for some budgets, e.g. cleaning/caretaking, stationery, maintenance etc.

RESPONSIBILITY FOR PHYSICAL RESOURCES

- Responsible for the accurate recording and updating of much confidential information, e.g. pupil and staff information using both manual and computerised records, financial/budgetary information etc.
- It is likely that the post holder will be a key holder to the building/part of the building and hold keys to the safe.
- Responsibility for maintenance includes, ensuring that regular inspections of buildings and grounds are undertaken, ensuring inventory checks on furniture and equipment are completed and authorising repair/replacement as necessary.
- In managing the caretaking staff, the post holder can indirectly influence the cleanliness and security of the building and grounds.

WORKING CONDITIONS

- Office-based.