# BENCHMARK JOB DESCRIPTION

JOB FAMILY: ADMINISTRATION/FINANCE/BUSINESS MANAGEMENT

LEVEL: C

JOB ID: 04AA

##### GRADE: 4

## LEVEL DESCRIPTION

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 may cover a range of tasks, which are relatively complex where good levels of literacy and numeracy skills are required.

The post holder would be expected to solve varied problems or develop solutions.

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

The post holder would be expected to plan over the short term (up to several weeks).

Exchanges varied information, orally or in writing, possibly with a range of audiences.

Demonstrate sensitivity and tact in contentious situations.

Post holder will manage own workload and probably oversee the work of others.

Manager is available for direction and guidance on unusual or difficult 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**

### Staff Supervision

* Supervisory responsibility for a small number of administrative/finance staff/secretaries who may be based throughout the school to include:
* co-ordinating the recruitment and selection process;
* identifying and organising training;
* prioritising workloads.

### School Administration

* Dealing with a wide range of enquiries, many on the Headteacher’s behalf.
* Identifying and setting up appropriate systems and procedures within the office.
* Maintaining diary of the Headteacher and other senior staff, making appointments, arranging and preparing for meetings etc.
* Attending and taking minutes at meetings, as required.
* Acting as first point of contact and main communication for Headteachers and/or School Management Team including telephone enquiries.
* Acting as the first point of contact in dealing with customer complaints, referring on to more senior staff as appropriate.
* Generating and producing correspondence.
* Maintaining the Head Teacher’s and/or school’s filing.
* Overseeing the accurate recording and updating of pupil and staff information using both manual and computerised records.
* Overseeing the administration of First Aid to pupils and staff, liaising with senior staff and parents and completing incident report forms.
* Sorting incoming and outgoing mail and maintaining necessary records.

### Financial Responsibilities

* Setting up appropriate budget allocations on the school’s financial management system, recording and monitoring income and expenditure against budget headings and producing reports for Head teacher/senior managers as required.
* Ensuring monies/invoices received are processed and banked, and that receipts are issued as appropriate.
* Maintaining financial records, checking bank statements and preparing cash statements as appropriate using computerised system.
* Analysing and investigating financial information in order to produce reports and financial statements as required.
* Ensuring that deadlines are met for the completion and return of all finance statements for Area Headquarters as appropriate.
* Maintaining school fund records and preparing annual balance sheets for auditor.

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. |  |
|  | * Demonstrable experience in successfully carrying out a range of administrative/financial procedures. |  |
|  | * Experience of supervising staff. |  |
|  | * Relevant qualification, such as NVQ 3 or BTEC/ONC or an equivalent level of knowledge. |  |

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| Literacy and numeracy | * Literacy and numeracy are needed for maintaining pupil, staff and administrative/finance staff records. * The post holder produces a range of correspondence on behalf of the Headteacher or other senior staff. |  |
|  | * Ability to collect monies and maintain accounts for schools activities e.g. dinner money. |  |

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| Organisational |  | * Good understanding of school structure. |
|  |  | * Knowledge of personnel policies and procedures, e.g. recruitment and selection. |
|  |  | * Knowledge of health and safety regulations and responsibilities. |
| **Criteria** | **Essential to basic performance of job** | **Required for fully competent performance of job** |
|  |  | * Knowledge of First Aid procedures and relevant paperwork. |
|  |  | * Knowledge of school’s financial procedures e.g. setting up, reconciliation. |

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| Knowledge & use of equipment | * Ability to use general office equipment. | * Knowledge of school’s computerised systems, may include specialised software, e.g. Oracle, SIMS etc. |
|  |  | * Knowledge of audio visual equipment. |

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| Any other (incl. Political) |  | * Broad understanding of Governors and their role. |
|  |  | * Broad understanding of Government initiatives and their impact on schools. |

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| **Mental Skills:** | | |
| Research | * Collate information on pupil or staff records, this could include statistical information. |  |
|  | * Prepare financial information for manager/ Area/Headquarters and auditors. |  |

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| Problem solving | * Identify variations from accepted patterns or missing documentation or other unusual aspects and refer them to line manager, e.g. incomplete accident record. |  |

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| Thinking creatively / Developing new ideas | * Establish work programmes for administrative/finance staff. |  |

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| **Criteria** | **Essential to basic performance of job** | **Required for fully competent performance of job** |
| Planning ahead | * Ensure routine and non-routine correspondence is produce on time. |  |
|  | * Assist in the preparation for schools activities e.g. sports day |  |
|  | * Ensure work allocated to the team meets deadlines. |  |

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| **Interpersonal & Communications Skills:** | | |
| Training and / or presentation skills | * Undertake induction training for new administrative/finance staff. |  |
|  | * May provide informal training to staff, e.g. presentation of financial information. |  |

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| Advising / guiding skills | * Provide advice and guidance to administrative/finance staff on range of issues, e.g. financial or administrative procedures & work allocation. |  |
|  | * May be required to informally advise teaching staff on procedures, e.g. First Aid, or how to access information. |  |

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| Negotiating, influencing or conciliating skills | * Influencing skills needed e.g. in work allocation and resolving staffing issues. |  |

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| **Criteria** | **Essential to basic performance of job** | **Required for fully competent performance of job** |
| Verbal and written communications skills (including use of languages) | * Make and receive telephone calls, answer queries or refer to line manager as required. |  |
|  | * Maintain a range of records, e.g. pupil exam results, first aid, etc, some of which may be confidential reports. |  |
|  | * Produce documents for, or on behalf, of the Headteacher or other senior staff. |  |

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| **Physical skills:** | | |
| Keyboard skills / use of mouse | * Keyboard and mouse skills are required to undertake range of tasks, e.g. the production of reports, routine and non-routine correspondence etc. | * Considerable demand for keyboard skills in inputting accurate information into school admin/finance systems. |

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| **Other attributes:** | | |
| Level of autonomy | * The post holder will be expected to make day-to-day decisions about their own workload and the workload of other administrative/finance staff. |  |
|  | * Includes semi-routine tasks requiring some personal initiative. |  |
|  | * Work covered by guidelines and procedures over a range of tasks. |  |

# EVALUATION NOTES

## KNOWLEDGE

* The post holder needs good literacy and numeracy skills to undertake a range of tasks, e.g. producing correspondence on behalf of the Headteacher, producing financial reports, etc.
* The post holder needs a broad knowledge of equipment, e.g. reprographics, audio typing and/or software packages, e.g. Word, Excel. More in-depth knowledge for e.g. specific software packages, could be obtained on the job as necessary.
* Experience of supervising staff and an overview of related personnel policies are necessary as the post holder will have responsibility for a small team of staff, including recruitment and selection, prioritising workloads and monitoring performance. More specific school policy knowledge can be gained in post.

## MENTAL SKILLS

* The post holder will use judgement and developmental skills when setting up appropriate systems, e.g. filing systems, spreadsheets etc and producing financial information for line manager/auditors.
* Post holder will undertake short term planning, e.g. managing own workload and managing the work of others, ensuring deadlines are met, planning for school activities.
* The post holder may become involved in medium term planning, for e.g. recruitment and selection, monitoring performance etc.
* The post holder is likely to be the first point of contact in dealing with customer complaints and would need to decide when to refer on to more senior staff.

## INTERPERSONAL AND COMMUNICATIONS

* The post holder will carry out and/or oversee a range of written communication tasks for which s/he will have overall responsibility, e.g. accurately recording accident information, personal information, pupil exam results, production of statistics, Records of Achievement, staff records etc. Much of the material handled will be of a sensitive and confidential nature.
* The post holder will communicate with range of visitors, staff and pupils within the school, often on behalf of the Headteacher. As a supervisor, the postholder will deal with the more sensitive/confidential issues and messages.
* The postholder 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 etc.

## PHYSICAL SKILLS

* Ability to use keyboard and mouse to produce accurate records, will include the production of reports, correspondence, inputting/updating financial information etc.
* Ability to use audio typing equipment.
* 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/financial staff.
* Dealing with a wide range of queries, in person and on the telephone and assessing when to refer to line manager/senior staff.
* Deciding the priority of work for the attention of the Headteacher.
* The organisation of the Head teacher’s diary.
* Generating correspondence on behalf of the Headteacher.

## 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, drafting correspondence.
* There could be work related pressure when overseeing the reception area, especially in busy periods, e.g. early morning or at the end of the school day.

## 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 ensures that a front line service to visitors to the school is provided. This requires an awareness of own customer care skills and those of administrative/finance staff.

## RESPONSIBILITY FOR SUPERVISION (EMPLOYEES)

* The post holder has supervisory responsibility for an individual or a small team. This includes co-ordinating the recruitment and selection process; identifying and organising training and prioritising workloads.

## RESPONSIBILITY FOR FINANCIAL RESOURCES

* The post holder is responsible for a range of financial tasks.
* Responsible for monitoring expenditure in order to ensure effective budgetary control for the school.
* The post holder may assist in setting school budgets and setting the annual budget plan.
* The post holder may have direct responsibility for some budgets, in addition to a monitoring role for other budgets.
* The post holder will ensure that monies collected are processed and recorded in accordance with financial procedures.

## RESPONSIBILITY FOR PHYSICAL RESOURCES

* The post holder is responsible for overseeing the administration of First Aid to pupils and staff, this includes responsibility for the completion of accident report forms within the school.
* Responsible for the accurate recording and updating of pupil and staff information using both manual and computerised records.
* It is likely that the post holder will be a keyholder to the building/part of the building.

## WORKING CONDITIONS

* Office-based.