



**Two Rivers High School**  
**Post Title – Finance Assistant**  
**Grade – Grade 5**  
**Date – July 2025**

## **Statement of Purpose**

To work under the direction and guidance of senior staff to provide general administrative and financial support to the school.

## **Support for Financial Administration**

- Undertake duties using school systems:
  - Responsibility for managing schools finance email account.
  - Ordering, processing and payment of all goods and services, ensuring finance procedures are followed.
  - Checking deliveries to ensure all goods are received, follow up any missing items and distribute orders received to the relevant member of staff.
  - Processing of invoices and credit notes, dealing with any queries as they arise and settling statements to ensure individual accounts are up-to-date.
  - Weekly tracking of dinner debts (pupil and staff), liaising with parties by phone and email, sending debt letters where required in accordance with Endeavour MAT Debt Policy.
  - Update the pupil premium tracker as required.
  - Processing and submitting petty cash claims.
  - Processing staff expense claims.
  - Processing of monthly credit card expenditure.
  - Maintenance of assets register.
  - Month end reconciliation tasks to ensure financial data is captured in the correct month.
  - Monitoring and update of the subscriptions tracker to indicate when paid and proactively ensure that subscriptions do not lapse.
  - Collection of fees and other dues as required.
- Undertake the administration of school lettings and other uses of school premises, responding promptly to enquiries, updating the lettings calendar, ensuring all appropriate lettings documentation is shared and complete information received, raising invoices in accordance with schools letting charges and debt management.
- Prepare for school auditors as required.
- Monitor all school trips and ensure appropriate financial documentation is completed and

submitted, updating the trips tracker on an ongoing basis.

- Provide routine clerical/administrative support e.g. photocopying, filing, emailing, completing routine forms, scanning to file and responding to routine correspondence.
- Maintain manual and computerised records/management information systems, this may include Arbor pupil/staffing MIS and finance systems.
- Undertake routine administrative procedures, including catering arrangements for finance meetings.
- Operate relevant equipment/computer applications (e.g. Word, Excel, databases, spreadsheets, Internet).
- Maintain stock and supplies for Finance staff, distributing as required.
- Provide general finance procedures guidance to staff, parents and other stakeholders.
- Undertake allocated training as required, e.g. safeguarding, health & safety and finance.
- Support Schools Bursar with other finance duties as required.

**Support to School (this list is not exhaustive and should reflect the ethos of the school)**

- Promote and safeguard the welfare of children and young persons you are responsible for or come into contact with.
- Be aware of and comply with policies and procedures relating to child protection, health, safety and security, confidentiality and data protection, reporting all concerns to an appropriate person.
- Be aware of, support and ensure equal opportunities for all.
- Contribute to the overall ethos/work/aims of the school.
- Appreciate and support the role of other professionals.
- Attend and participate in relevant meetings as required.
- Participate in training and other learning activities and performance development as required.
- Demonstrate, give advice & guidance to, or train other employees, students or trainees on own duties.

***Note 1: The content of this job description will be reviewed with the post holder on an annual basis in line with the School's performance and development review policy. Any significant change in level of accountability that could result in a change to the grade must be discussed with the post holder and the relevant trade union before submitting for re-evaluation.***

**Person Specification**  
**Finance Assistant**  
**Level 2**

Essential Criteria	Measured By
<p>Experience</p> <ul style="list-style-type: none"> <li>General administrative/financial work.</li> </ul>	AF/I
<p>Qualifications/Training</p> <ul style="list-style-type: none"> <li>NVQ 3 Business and Administration or equivalent qualification or experience in relevant discipline.</li> <li>Good numeracy and literacy skills - minimum GCSE grade 4 in Math's &amp; English (or equivalent).</li> </ul>	AF/I
<p>Knowledge/Skills</p> <ul style="list-style-type: none"> <li>Effective use of ICT packages.</li> <li>Ability to use relevant equipment/resources.</li> <li>Good keyboard skills.</li> <li>Knowledge or relevant policies/codes of practice and awareness of relevant legislation.</li> <li>Ability to work constructively as part of a team.</li> <li>Ability to relate well to children and to adults.</li> <li>Good organising, planning and prioritising skills.</li> <li>Methodical with a good attention to detail.</li> </ul>	AF/I
<p>Behavioural Attributes</p> <ul style="list-style-type: none"> <li>Customer focused.</li> <li>Has a friendly yet professional and respectful approach which demonstrates support and shows mutual respect.</li> <li>Open, honest and an active listener.</li> <li>Takes responsibility and accountability.</li> <li>Committed to the needs of the pupils, parents and other stakeholders and challenge barriers and blocks to providing an effective service.</li> <li>Demonstrates a "can do" attitude including suggesting solutions, participating, trusting and encouraging others and achieving expectations.</li> <li>Is committed to the provision and improvement of quality service provision.</li> <li>Is adaptable to change/embraces and welcomes change.</li> <li>Acts with pace and urgency being energetic, enthusiastic and decisive.</li> <li>Communicates effectively.</li> <li>Has the ability to learn from experiences and challenges.</li> </ul> <p>Is committed to the continuous development of self and others by keeping up to date and sharing knowledge, encouraging new ideas, seeking new opportunities and challenges, open to ideas and developing new skills.</p>	AF/I

**AF - Application form**

**I - Interview**