

**THE CHILDREN FIRST LEARNING PARTNERSHIP**

**Office and Financial Services Job Description**

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| Job Title | Office and Financial Services Manager ( Reviewed annually) |
| Grade | Grade 9 ( Reviewed annually) |
| Accountable to | The Chief Financial Officer  |
| Reporting to | The Chief Financial Officer / Head Teachers |
| Responsible for |  |

**Statement of Purpose**

* To organise and supervise effective administrative systems within the identified schools, including finance and human resources.
* Contribute to the planning, development and monitoring of support services and management of Clerical Assistant staff, including coordination and delegation of relevant activities.

# Support to Children First Learning Partnership Multi Academy Trust

* To develop, implement and review data protection policy, and other related policies and procedures:
* To provide information, advice and recommendations to the school leadership teams regarding compliance with relevant legislation.
* To ensure school procedures are compliant with relevant legislation, including the General Data Protection Regulations (GDPR).
* To provide advice concerning Data Protection Impact Assessments (DPIAs).
* To support the schools with data processing agreements with existing and future data processors.
* To undertake audits of the school’s data protection procedures and address any issues highlighted.
* To provide training and advice to staff members who are responsible for processing data.
* To apply best practice and highest standards of school financial management to optimise value for money and maximise efficiencies utilising effective procurement processes, supply and fixed asset management:
* To review commercial agreements and contracts to gain economies of scalecost advantages.
* To be responsible for contract negotiations, production of contractual documentation, assessing contractual effectiveness, managing spending profiles and developing good working relationships with suppliers.

# Support to Other Staff

* To provide organisational and complex advisory personal support to other staff e.g. Head Teachers
* To provide organisational and complex advisory support to Directors and Board Members.
* To provide advice and guidance to staff and others on complex issues.

# Support Human Resource Management

* Take a lead role in planning, development, design, organisation and monitoring of support systems/procedures/policies.
* Take a lead role in the recruitment of Clerical Assistants and in managing associated employment procedures.
* Interpret matters of policy/procedure/statute to ensure the school’s compliance and initiate appropriate action arising.
* Determine the need for and provide, analyse and evaluate data and detailed reports/information, including SRMA Bench marking findings.
* Submit relevant information to outside agencies e.g. DFE, Staffordshire County Council.
* Line management responsibilities for between one and five members of staff:
	+ Manage Clerical Assistants.
	+ Liaise between managers’/teaching staff and Clerical Assistants.
	+ Hold regular team meetings with Clerical Assistants.
	+ Undertake induction/appraisal/training/mentoring of Clerical Assistants.

**Human Resources**

* Operate and maintain the payroll software/system (MyView):
* Independently process end to end payroll processing.
* Maintaining accurate payroll records.
* Reconcile monthly payroll changes.
* Operate and maintain the school information management system (SIMS):
* Maintaining accurate staff personal and contract details.
* Maintaining staff sickness details.
* Undertake confidential administration.
* Maintain confidential staffing records.
* Manage and check the safe recruitment process including undertaking relevant checks, e.g. DBS.
* Undertake arrangements for staff appointments, arranging advertisements and interviews, requesting references, preparing interview schedules and panels.
* Administration and support of confidential medical inspections and reports on staff.
* Completion of appropriate forms to ensure contractual and payroll information is produced and accurately maintained.
* Report and monitor all staff absences.
* Monitor and check claims for employment e.g. additional hours, casual/supply claims.
* Monitor and check travel claims.
* Assist with the arrangements of cover of Clerical Assistant.
* Liaise with HR service on specific HR issues.
* Liaise with Payroll administration as appropriate.

# Support Organisational Management

* Take lead role in the development and maintenance of record/information systems.
* Provide detailed analysis and evaluation of data and produce detailed reports/information as required.
* Produce, and respond to, complex correspondence.
* Manage complex administrative procedures.
* Be responsible for completion and submission of complex forms, returns etc., including those to outside agencies e.g. work force census.
* Undertake research and obtain information to inform decisions.
* Manage service contracts.
* Manage school licences and staff insurance.
* Take a lead role in marketing and promoting the school.

**Administrative Management**

* Manage all administrative systems and functions.
* Undertake general clerical duties as and when necessary e.g. reception duties.
* Manage school and pupil records, both manual and computerised e.g. SIMS.
* Take notes at meetings.

# Support Financial Management

* To support the Chief Financial Officer and Head Teacher to prepare the preliminary annual budget plans, including the maintenance of staffing costs on school budgeting software e.g. HCSS.
* Manage financial administration procedures.
* Take a role in procurement and securing sponsorship/funding.
* Take a role in planning, monitoring and evaluation of budgets.

# Finance

# Undertake the schools accounting system (SAGE):

* + Ordering, processing and payment of all goods and services.
	+ Operation and regular reconciliation of bank accounts.
	+ Maintenance of assets register.
	+ Preparation of invoices.
	+ Collection of fees and other dues.
	+ Recovery of bad debts.
* Monitor closely subject and school trip budgets.

**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.

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|  **Office and Financial Services Manager – Person Specification** |
| **Criteria** | **Essential** | **Desirable** |
| **Experience** | * Several years’ experience working in office environment at a management level.
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| **Qualifications /****Background** | * NVQ Level 4 or equivalent qualification or experience in a relevant discipline.
* Excellent numeracy/literacy skills.
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| **Skills, Abilities and** **Competencies**  | * Effective use of specialist ICT packages.
* Use of specialist equipment/resources.
* Full working knowledge of relevant polices/codes of practice/ legislation.
* Ability to organise, lead and motivate other staff.
* Ability to plan and develop systems.
* Ability to relate well to children and adults.
* Ability to work constructively as part of a team, understanding school roles and responsibilities and your own position within these.
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| **Behavioural Competencies**  | * Builds personal relationships with stakeholders, through regular contact and consultation.
* Coaches and empowers team members to take responsibility for ensuring customer care.
* Understands the school’s development plan and how it relates to team and individual objectives.
* Accepts, supports and quickly implements change.
* Identifies and promotes best practice and encourages the sharing of ideas.
* Proactively seek opportunities to increase job knowledge and understanding.
* Values the diversity of individuals, adaptable approach to meet individual needs and effectively utilises the diversity of team members.
* Works with others to resolve differences of opinion and resolve conflict.
* Requires minimum supervision.
* Takes responsibility for own and team actions.
* Identifies and overcomes barriers and manages risks.
* Takes quick and effective action.
* Demonstrates focused implementation of role and responsibilities.
* Builds strong team ethos where everyone feels valued.
* Provides timely, sensitive and honest feedback on performance.
* Is accountable for own development and encourages the ownership of development needs amongst team members.
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| **Personal Qualities** | * Excellent relationship management, with the ability to build effective working relationships at all levels, and reinforce partner-ships.
* Ability to articulate vision to a variety of audiences.
* Advocacy, facilitation and negotiation skills.
* Intellectually versatile and innovative.
* Emotionally intelligent and perceptive.
* Honest and transparent in all business activities.
* Demonstrates energy, dynamism and resilience.
* Proactive and positive approach to problem solving.
* Calm under pressure and self-motivated.
* Ability to influence and pursue challenging and rigorous questions.
* Excellent interpersonal, skills with the sensitivity to work well in a team.
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