

**CHESHIRE WEST AND CHESTER BOROUGH COUNCIL**  
**JOB DESCRIPTION QUESTIONNAIRE**

|                  |  |                   |                 |
|------------------|--|-------------------|-----------------|
| <b>JOB TITLE</b> | <b>Administration Assistant -<br/>Primary School</b> | <b>JOB REF NO</b> | <b>AAAD5051</b> |
|------------------|--|-------------------|-----------------|

**BASIC JOB PURPOSE**

To provide a general clerical support across a range of duties taking responsibility for designated areas so that administrative processes related to the work of the school are effectively executed.

|  | <b>MAIN RESPONSIBILITIES</b>   |
|--|--|
| <b>1.</b>  | Provide general clerical support for the school including word processing, photocopying, filing, collation of information, distribution of mail, diary organisation etc to ensure the efficient and timely provision of information. |
| <b>2.</b>  | Administer the finances of school activities, not financed from school funds, reconcile bank statements and maintain records to ensure that necessary information is readily available.  |
| <b>3.</b>  | Collect, count and bank cash and cheques received e.g. dinner monies, donations etc. and maintain accurate records of all monies received to ensure that all monies are accounted for.   |
| <b>4.</b>  | Develop and maintain administrative and clerical systems relating to financial records.  |
| <b>5.</b>  | Coordinate and administer the procedures related to the admissions of pupils under the direction of the Headteacher.   |
| <b>6.</b>  | Set up and coordinate the procedures related to the Annual Review of any pupils with statements of special needs.  |
| <b>7.</b>  | Maintain and update manual school files, including staff and pupil records to ensure that accurate information is stored securely and available for use by appropriate persons.  |
| <b>8.</b>  | Deal with telephone and face to face enquiries to ensure that all calls/visitors are handled efficiently and effectively and good relations fostered.  |
| <b>9.</b>  | Receive goods and other items (including pupil's personal possessions) and ensure they get to the correct destination.   |
| <b>10.</b>   | Complete and process personnel and payroll documentation for new starters and administer any changes.  |
| Notwithstanding the detail in this job description, in accordance with the School's/Council's Flexibility Policy the job holder will undertake such work as may be determined by the Headteacher/Governing Body from time to time, up to or at a level consistent with the Main Responsibilities of the job. |  |

## 1 RESPONSIBILITY FOR SUPERVISION / DIRECTION / COORDINATION OF EMPLOYEES

### Employees directly supervised by jobholder

Not Applicable

**What does the supervision / management of these employees involve? (eg allocating work, training for the job, assessing performance - see guidance notes)**

Not applicable

### Other Employees supervised by jobholder (not in a direct line relationship)

Not Applicable

**Does the job involve supervision, direction or management of people who are not employees? eg contractors, students on secondment**

| <u>No and FTE</u> | <u>Levels / grades</u> | <u>Types of work</u>      | <u>Where based</u> |
|-------------------|------------------------|---------------------------|--------------------|
| Varies            | Contractors            | Building trades, ICT, etc | School site        |

**What does the supervision of these people involve?**

1. Show them to where the work is, explain the problem, ensures H & S and security is not compromised, ensures log is signed on departure.

**Does the jobholder develop policy or provide advice and information which impacts on the supervision / direction / coordination of employees?**

Not Applicable

## 2 RESPONSIBILITY FOR FINANCIAL RESOURCES

| Financial responsibility  | Value of the financial resource (p.a.) | How often is the duty performed? |
|---|--|----------------------------------|
| <b>Cash handling and processing: eg dinner money, trip money, school fund.</b> <ul style="list-style-type: none"><li>• Collects cash and cheques and maintains records, counts and reconciles receipts against records, prepares for banking.</li></ul> |  | Daily                            |
| <b>Unofficial school fund:</b> <ul style="list-style-type: none"><li>• Administration of school fund. Recording income and debits, security of cash.</li></ul>  |  |                                  |

|  |  |  |
|--|--|--|
| Reconciliation of bank statements  |  |  |
| <b>Imprest:</b> <ul style="list-style-type: none"> <li>Administration of imprest account, makes payments, reconciles, draws cheques</li> </ul> |  |  |
| <b>Staff Expenses:</b> <ul style="list-style-type: none"> <li>Checks claims and calculations for accuracy, codes, records</li> </ul>           |  |  |

**Does the jobholder develop policy or provide advice and information which impacts on financial resources?**

Not Applicable

### 3 RESPONSIBILITY FOR PHYSICAL RESOURCES

| Physical resource  | Nature of responsibility of jobholder  | How often is the responsibility exercised?    |
|--|--|---|
| <b>General office equipment:</b><br>PC, printer, fax, laminator, photocopier etc   | Shared responsibility for safe use, resolves straightforward break downs and demonstrates correct usage to new staff.  | Daily   |
| <b>Records: manual, including:</b> <ul style="list-style-type: none"> <li>Staff records</li> <li>pupil files , pupil folders</li> <li>Supply teacher lists and details</li> <li>School registers</li> <li>School General Filing system</li> <li>Payroll and personnel documentation</li> </ul> | Maintains accurate records, updates, ensures confidentiality and security, Some information sensitive & highly confidential<br><br>Sets up new files and maintains system<br><br>Completes documentation for starting and payment of new staff, changes to details of established staff. | Daily<br><br><br><br><br>Daily<br><br>Monthly |
| <b>Word Processed Documents:</b><br>Forms, letters, reports, policies, and other documents   | Produces accurate, well presented documents in required format. Some are of a confidential nature.   | Daily   |
| <b>Job application packs:</b>  | Collation, distribution and coordination of recruitment process  |   |

|  |  |  |
|--|--|--|
| <b>Lost property and pupils' other personal possessions:</b> | Shared responsibility for security, acceptance and safekeeping of items. |  |
|--|--|--|

**Does the jobholder develop policy or provide advice and information which impacts on physical resources?**

Not Applicable

#### **4 RESPONSIBILITY FOR IMPACT ON PEOPLE**

| <b><u>Task/Duty</u></b>  | <b><u>Who benefits?</u></b>  | <b><u>How they benefit?</u></b>   |
|--|--|---|
| <b>First point of Contact –</b><br>Receives all visitors to school and responds to a wide range of telephone and drop in enquiries   | Pupils, parents, staff, visitors, suppliers, Governors, sales reps., LEA officials, external organizations, other professionals. | Access to or provision of accurate school information   |
| <b>School Security –</b> operation of door entry system.   | Staff, pupils, visitors  | School security and safety is maintained  |
| <b>Administration of Schools Admission/Transfer Process –</b><br>Takes names, arranges visits, sends out forms, letters etc., according to appropriate time scales   | Parents, pupils  | Process dealt with effectively and sensitively and Head Teacher relieved of administration duties |
| <b>Organisation of Head Teachers Diary</b> and diary of school appointments, visits, events  | Headteacher and school community   | Effective use of time   |
| <b>School visits –</b> books transport (on behalf of teachers, liaises with venue re visit   | Pupils, Teachers   | Co-ordinated arrangements made for visits   |
| <b>Administration of recruitment process for all staff -</b> (including volunteers) – as appropriate, places advert, sends out application package, letters for interview, obtaining all checks (CRB, medical, references) | Staff and potential staff, pupils, volunteers  | Efficient recruitment service<br>Qualified and checked staff engaged                              |
| <b>Administration of medicines and inhalers –</b> with parental permission   | Pupils, parents and staff  | Timely administration of essential medication   |

**Does the Jobholder develop policy or provide advice and information which impacts on people?**

Not Applicable

## 5 KNOWLEDGE

| Type of knowledge  | What knowledge is essential?   | Why are these needed?  | How is it normally acquired?  |
|--|--|--|---|
| <b>Qualifications, experience and specialist knowledge</b> | Knowledge of financial record keeping systems, understanding of office systems and procedures, filing, record keeping and organisational skills  | To develop office systems, keep accurate records including financial, handle cash, word process correspondence | NVQ 2 in office administration or equivalent and office experience          |
| <b>ICT and admin systems and packages</b>                  | Keyboard skills + knowledge of databases including SIMS, spreadsheets, Word, Outlook, Internet   | To word process, maintain records  | CLAIT or ECDL level of proficiency + experience and short training courses. |
| <b>Equipment</b>   | General office equipment and PC's & printers   | To use and carry out day to day maintenance  | Experience and on the job training  |
| <b>Policies and procedures</b>                             | Working knowledge of school policies and procedures, CCC guidelines including cash handling, personnel and finance procedures, Health and Safety and Fire Regulations, data protection | To ensure compliance to meet deadlines and to ensure confidentiality is maintained                             | Induction, experience on the job  |
| <b>Organisational and service based knowledge</b>          | Understanding of: School context, rules, ethos and school cycles   | To be aware of staff roles & responsibilities, school events   | Induction and on the job experience   |
|  | Understanding of Admissions and Transfer process for all pupils  | To ensure correct documentation is available for deadlines   | On the job experience   |
|  | General knowledge of CCC Education, Special Needs and other departments and external agencies  | To understand who does what, where to obtain & send information, liaise & resolve problems                     | Induction and on the job experience   |

### **How long would it take for a jobholder to become fully operational?**

Within a few weeks should be able to carry out basic routine tasks, filing, word processing etc. but a few months to become familiar with the school cycle and assimilate school specific knowledge re staff, parents, external organizations etc.

## 6 MENTAL SKILLS

- a) What sort of situations/problems does the jobholder typically have to deal with?  
Give two examples of typical problems solved on a regular basis.

**Example Admissions** – the jobholder has to plan to ensure that all the information required is sent out to prospective parents and to ensure that deadlines are met. Once admitted the jobholder enters all the relevant information onto the SIMS database and administers an annual review of the data.

**Example - Information gathering** – Gathering and collation of information (manual and computerised) eg, attendance, medical, SEN, etc for completion of statistical returns such as PLASC (statistical snapshot of pupil data).

**Example – WEB reports** - Checking WEB reports against local records to find any discrepancies

- b) Give an example of the most difficult or demanding situation/problem the jobholder has to solve.

**Example – Stock Requisition** – A large order for stock and resources is made once a year. The jobholder checks prices and quantities against the previous year's spreadsheet and the current catalogue and updates the spreadsheet accordingly. The jobholder cross checks information to find best value, collates the order, checks off the items when delivered and chases up any missing items until the order is completed.

- c) Approximately how often would the example in (b) occur?

On going everyday all year round

Give details below of the mental skills required in the job and reasons why they are needed.

| Mental Skill            | Why Needed?  |
|-------------------------|--|
| Fact finding            | Gathering and collation of data for statistical reports. Checking various suppliers to obtain best value       |
| Organisational/Planning | Collation of information and administration of recruitment and annual admissions processes. To meet deadlines. |
| Judgement               | Responding to varied enquiries, determining who to refer enquiries to.   |
| Creativity              | Production of attractive school information and presentation of letters  |
| Analytical              | To find discrepancies with cash receipts and to check web reports.   |

## 7 INTERPERSONAL AND COMMUNICATION SKILLS ESSENTIAL FOR THE JOB

| Skill  | Used for?  | With whom?  |
|--|--|---|
| Written:– good punctuation and grammar required and good presentation – information must be concise and easily understood. mainly factual, straightforward information, some may be confidential | <ul style="list-style-type: none"> <li>To write messages</li> <li>Notes for parents</li> <li>to type correspondence, reports etc from dictation / copy / outline details</li> <li>Completion of LEA and DFEE returns</li> <li>Update school prospectus</li> <li>Record keeping</li> </ul>  | Staff, parents, LEA, other organizations, other schools, , community, pupils, governors, Area Education staff, new parents, CCC staff   |
| Oral skills – face to face and telephone – as first point of contact – need for patience, tact, diplomacy and sensitivity.   | <ul style="list-style-type: none"> <li>Listening to establish what enquirer wants</li> <li>exchange of information</li> <li>giving instructions</li> <li>redirecting to appropriate person</li> <li>Front of House Public Relations Role</li> <li>Liaison</li> <li>taking messages</li> <li>Ability to diffuse situations and remain calm</li> <li>Teamwork</li> </ul> | Teachers, staff, pupils, parents, suppliers, visitors, Governors, sales reps., LEA officials, external organizations, other professionals, general public, prospective staff and parents, contractors |

## 8 PHYSICAL SKILLS ESSENTIAL FOR THE JOB

| Physical skill                             | Used for?  | Any precision/speed requirements?               |
|--|--|---|
| Hand eye coordination and manual dexterity | Keyboard skills to input accurate data, maintain records, word process documents – fundamental to the job. | Accuracy – good speed to deal with high volumes |

## 9 INITIATIVE AND INDEPENDENCE

### Allocation of work

#### a) How is work allocated to the jobholder?

Mainly routine tasks which are fitted in with other cyclical work such as budget checking or to meet banking deadlines, Adhoc tasks allocated by Head Teacher and other staff. Reacting to phone and callers.

#### b) What is a typical cycle for allocating work to the jobholder *eg hourly, daily, weekly?*



Daily, weekly , monthly, ½ termly, termly and annual cycles and reactive  
**Scope for initiative**

**c) How much freedom/discretion does the jobholder have:**

**to change the way work is done?**

*(e.g. recommending changes in policy, procedures, resources)*

Suggestions about day to day work practices to improve work efficiency can be discussed with the Head Teacher and the admin team.

**to allocate their time to duties?**

The jobholder is able to prioritise their own work, subject to school requirements, known priorities and the directions of the head Teacher and manager.

**d) What is the level of guidance/instruction available?**

School policies and procedures, CCC and LEA procedural guidelines. Guidance from line manager or Headteacher.

**e) What sort of direction, management or supervision is given to the jobholder?**

There is daily contact with the Head Teacher who is generally available to give advice and guidance and support if required. Day to day supervision from line manager is on an informal basis.

**f) Give three examples of problems or decisions the jobholder would be expected to deal with themselves without reference to a supervisor/manager. How often do these occur?**

| <b>Expected problem</b>  | <b>Nature of available guidance</b>   | <b>Typical Frequency</b> |
|--|---|--------------------------|
| Responds to straightforward queries or redirects to appropriate person   | Experience, precedents, initiative, knowledge of school and staff           | Daily                    |
| Cash discrepancies – job holder would check and rectify.   | Cash handling guidelines, initiative  | Monthly.                 |
| <b>Unexpected problem</b>  | <b>Nature of available guidance</b>   | <b>Typical Frequency</b> |
| If the jobholder spots or is told about a problem with the building e.g. boiler breakdown, toilets blocked in the absence of the Site manager, would contact | Experience, precedents, initiative, knowledge of procedures and contractors | Few times a year         |

|   |  |  |
|---|--|--|
| appropriate person to get problem rectified |  |  |
|---|--|--|

**g) Give two examples of problems or decisions the jobholder would be expected to refer to their supervisor/manager. How often do these occur?**

| <b>Problem or decision</b>                                    | <b>Point of referral</b> | <b>Typical Frequency</b> |
|---|--------------------------|--------------------------|
| Parental complaints or concerns                               | Referral to Headteacher  | Several times per year   |
| Requests for ordering of unusual or expensive items by staff. | Referral to Headteacher  | Few times a year         |
| Staff queries re: leave and absence.                          | Referral to Headteacher  | Several times a year     |

## **10 PHYSICAL DEMANDS**

| <b>Physical Demand</b>  | <b>Typical Duration</b>    | <b>How often?</b> | <b>Other details (eg how heavy?)</b> |
|---|----------------------------|-------------------|--------------------------------------|
| Sitting at work station to use PC and other normal office demands such as filing etc. | Throughout the working day | Daily             |                                      |
| Lifting, moving and carrying of deliveries and stationery                             | Short bursts               | Few times a week  | 5 – 10 reams of paper                |

## 11 MENTAL DEMANDS OF THE JOB

| Nature of task   | Mental Demand   | Duration | Frequency |
|--|---|----------|-----------|
| Reception of visitors and telephone answering  | Constant awareness, attentiveness & alertness to security whilst carrying out other tasks, careful listening to enquirers, filtering of calls |          |           |
| Administrative tasks <ul style="list-style-type: none"> <li>• Checking web reports</li> <li>• Administration of school fund</li> <li>• Ordering and checking of goods</li> <li>• Invoice processing</li> <li>• Word processing and proof reading</li> <li>• Data collection</li> <li>• Cash handling</li> <li>• Routine clerical tasks, filing, copying etc</li> <li>• Maintaining records, data input.</li> </ul> | Concentration, attention to detail, accuracy, checking documents for clarity of contents and accuracy, awareness of deadlines                 |          |           |

To what extent is the job subject to work-related pressures e.g. regular deadlines, frequent interruptions, conflicting demands?

| Nature of pressures / interruptions                          | Source  | For how long? | How often? |
|--|---|---------------|------------|
| Interruptions and conflicting demands – inherent part of job | There is a need to mentally switch between a regular flow of school telephone and reception enquiries whilst undertaking administrative duties. There are also simultaneous demands from different members of staff, parents & pupils each having their own priorities & deadlines. |               |            |
| Deadlines  | 3 <sup>rd</sup> party imposed – staff, Headteacher etc<br>Banking of cash, Statutory deadlines, annual pupil reports and IEP's, Records of Achievement for year end, Recruitment deadlines, admissions process, statistical returns.  |               |            |

If the jobholder is subject to any other form of mental demand, please give details below.

## 12 EMOTIONAL DEMANDS

Not Applicable

## 13 WORKING CONDITIONS

- a) In what kind of places does the jobholder normally work (eg office, library, gardens, clients' homes)?

If more than one, give approximate proportion of time in each.

| Location of work                            | Proportion of time |
|---|--------------------|
| Normal office environment in primary school | 100%               |

- b) If the jobholder works outside, are they expected to work regardless of the weather or are alternative arrangements made eg work on other duties?

no

- c) What unpleasant environmental working conditions or behaviour from other people are met in performing the job? (See guidance notes for examples)

| Working Condition or Behaviour from other people   | How long does it last at any one time? | How often does it typically occur? |
|--|--|------------------------------------|
| <ul style="list-style-type: none"><li>Parents who are aggrieved, upset or angry, with complaints or concerns</li></ul> | Few minutes                            | Few times a year                   |

- d) What protection is offered (if any) e.g. against adverse weather (clothing, shelter), against infection, security measures etc.

Not Applicable