

CHESHIRE WEST AND CHESTER BOROUGH COUNCIL
JOB DESCRIPTION QUESTIONNAIRE

JOB TITLE	Administration Officer – Primary School	JOB REF NO	AAAD5052
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BASIC JOB PURPOSE

To be responsible for the effective and efficient administration of financial and other office procedures.

NO	MAIN RESPONSIBILITIES
1.	Monitor and control the implementation and virement of funds to ensure that the budget is administered according to the agreed School Development Plan.
2.	Monitor and review school budget headings and advise the Head Teacher and Governing body on the strategic budgetary position to enable over and under spending areas to be identified and corrective action to be taken.
3.	Develop, implement, coordinate, review and manage the school's office, administrative and financial systems to maximise the effective coordination of all school support activities.
4.	Oversee the maintenance of pupil records, including registration, admission and transfer procedures and associated statistical analysis for Headteacher, LEA and DFEE returns to meet management and statutory requirements.
5.	Develop, implement, coordinate, review and manage the school's office, administrative and financial systems to maximise the effective coordination of all school support activities.
6.	Oversee the maintenance of pupil records, including registration, admission and transfer procedures and associated statistical analysis for Headteacher, LEA and DFEE returns to meet management and statutory requirements.
7.	Input and maintain all financial information (including raising orders and processing invoices to ensure accurate information is available and financial regulations are followed.
8.	Lead, motivate, develop and train clerical staff and / or other non teaching staff to ensure their effective deployment for the benefit of the school.
9.	Liaise with contractors/suppliers concerning the ordering of goods and supply of services to the school and monitor the service provided to ensure the optimum use of resources.
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

<u>No and FTE</u>	<u>Levels / grades</u>	<u>Types of work</u>	<u>Where based</u>
Varies but usually 1	Clerical staff	General clerical support – phone, reception, filing	School Office

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

Full line management responsibilities – recruitment, induction, on the job training or identification of training needs, allocation and checking of work, performance and absence management, contributes to appraisal.

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

<u>No and FTE</u>	<u>Levels / grades</u>	<u>Types of work</u>	<u>Where based</u>
P T - Varies	Cleaners	Cleaning	school
PT – Varies	Midday Assistants	Supervising pupils during lunch time, setting up tables, assisting with meal times	School kitchen / dining room

What does the supervision of these employees involve?

Maintain an overview. Responsibility for day to day supervision is carried out by other school staff

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>
	Contractors	Repair and maintenance of equipment, Builders,	Working on school site

		electricians, joiners etc	
	Work experience students, volunteers, teachers on teaching practice	Clerical support, classroom support	Working on school site
	Supply teachers from agencies or Cheshire agency	Qualified teachers	Contracted to work at school
	Visiting professionals (Education Welfare Officers, Connexions, Nurse, doctors etc	Professional specialism	Working at the school

What does the supervision of these people involve?

1. Report to jobholder who directs to site maintenance officer or deals directly with contractors if unavailable, ensures logbook signed
2. Carries out general induction into the school. Maintains an overview of progress whilst in the school.
3. Contacts supply staff to cover absence, general school induction, completion of pay documentation

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

Yes

If yes, give details

Provides basic advice and information to staff on day to day personnel issues such as sickness, leave entitlements etc.

2 RESPONSIBILITY FOR FINANCIAL RESOURCES

Financial responsibility	Value of the financial resource (p.a.)	How often is the duty performed?
School LMS Delegated Budget and Standards Funds: Costs out budget including staffing, models various options for affordability, creates budget which meets school plans for approval by governors, monitors expenditure, follows up on discrepancies, reviews at half year and year end, provides regular reports to governors, annual closure of accounts		Daily
Income: Triggers and makes claims from long term sickness scheme		

Unofficial School Fund: Administration of school fund, recording income and debits, security of cash, preparation of annual accounts for external audit		Daily
Imprest account: Administration of imprest account, obtaining receipts, making cash payments, reconciliation of cheques books and bank statement. Reconciliation of credit card statements		Daily
Invoices: Processing of invoices for goods received, coding and passing for payment. Generation of invoices for hire of school facilities, joint site services, Health Authority recharges.		Daily
Cash handling and processing: Cash and cheques Either oversees clerical assistant in collection, counting, reconciliation of receipts and preparation for banking or carries out task personally		Daily

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

If yes, give details

The jobholder gives advice and / or information to Headteacher and Governors on finance related matters.

Job holder carries out research on issues such as best value, presents findings with recommendations to governors.

3 RESPONSIBILITY FOR PHYSICAL RESOURCES

Physical resource	Nature of responsibility of jobholder	How often is the responsibility exercised?
Stocks and Supplies:	Places orders for supplies and equipment for school to meet staff requirements. Researches for best value. Presents findings to Governors. Orders and maintains adequate stocks of office stationery items	Daily
Records and information: <ul style="list-style-type: none"> • Manual personnel record files • Pupil records • Diaries and calendars of events. • Financial records • Inventory of assets • Payroll and personnel forms • Exam documents including external exam papers 	Sets up files, enters data, updates and ensures accuracy, security and confidentiality of data. Enters information onto SIMS data base. Where appropriate extracts data and generates periodic financial and personnel reports Maintains diaries and calendars of events. Co-ordination of pupil assessment process, pupil attendance records, safekeeping of exam papers and assessment materials, distribution to relevant persons. Development of administrative systems to improve the efficiency of office procedures. Completes documentation for starting and payment of new staff, changes details of established staff. Where personnel administration package is not purchased; drafts and issues Statements of Written Particulars to new staff	Daily
Word Processed Documents <ul style="list-style-type: none"> • Newsletters and correspondence • Minutes of Governor meeting and committees • School documentation – school handbook, prospectus, induction policy records 	<ul style="list-style-type: none"> • Takes minutes, types up and distributes • Drafting and typing of general correspondence and Headteacher's confidential correspondence. 	

Equipment: <ul style="list-style-type: none"> • PC's, copiers, printers, fax and other non-curriculum equipment 	<ul style="list-style-type: none"> • Day to day use and maintenance • Sets up contracts, organizes repairs and maintenance 	Daily
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Does the jobholder develop policy or provide advice and information which impacts on physical resources?

Not Applicable

4 RESPONSIBILITY FOR IMPACT ON PEOPLE

<u>Task/Duty</u>	<u>Who benefits?</u>	<u>How they benefit?</u>
Administers pupil admission and transfers process and external assessments process	Pupils, teachers and parents	Smooth, efficient and coordinated administrative process, teachers and Head Teacher relieved of administrative duties
Reception of visitors, Responding to telephone enquiries and organisation of school visits by new pupils, parents & potential pupils	Pupils, parents, professionals, contractors, general public	Comfortable, welcoming impression, accurate information given
Administration of recruitment process for all staff – advertising, letters for interview, obtaining all checks (CRB, medical, OHU, references), notification of appointment & issue of contract	Staff and potential staff Pupils and parents	Efficient recruitment service Suitably qualified and checked staff engaged
Checks attendance register & takes appropriate action on absence: contact parent, EWO, Social Services	Pupils, parents, Education Welfare Officers, Social Services	Prompt action taken, good attendance encouraged, potential problems highlighted
Servicing, taking minutes for Governors and other meetings (where Governors package is not purchased)	Governors and the school community	Timely implementation of decisions, timely circulation and receipt of information
School lettings – sends out confirmation letter, deals with any problems eg defective equipment. Orders refreshments	Hirers of school facilities	Room made available with facilities to meet needs of hiring body

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

If Yes, give details:-

The jobholder gives information to Head teacher and Governors related to pupil issues such as attendance, behaviour, medical or social issues.

5 KNOWLEDGE

Type of knowledge	What knowledge is essential?	Why are these needed?	How is it normally acquired?
Qualifications, experience and specialist knowledge	<ul style="list-style-type: none"> • Knowledge of financial accounting systems • General office and administrative skills • Supervisory skills • Knowledge of personnel issues and administration procedures • Good literacy & numeracy skills including fractions & percentages 	<p>To compose letters & newsletters</p> <p>Cost out budgets, monitor expenditure, model different scenarios.</p> <p>To supervise clerical staff</p> <p>To set up and maintain records and systems</p> <p>To administer personnel procedures</p>	NVQ2/3 level or equivalent + 3 to 5 years experience in financial or general administration
Equipment and tools	Ability to use general office equipment	Day to day use and maintenance	On the job experience
ICT skills	Word processing and financial software packages, Email + SIMS (in-house database), spreadsheets	To word process documents, maintain records, manage finance, input data	Internal training + on the job experience
Organisational	General knowledge of CCC Education Service + support services (payroll, personnel, AEO's etc)	To understand who does what, where to obtain information & resolve problems	On the job experience
	Knowledge of other professionals associated with school	To know who to contact and where they are based	On the job experience
	Understanding of examination and annual review processes and associated procedures	To administer and coordinate process	On the job experience
	Understanding of admissions and transfers process	Effective administration and coordination	On the job training
	Working knowledge of mechanics of governing body procedures	To service meetings and understand how decisions are made.	On the job experience
Policies and Procedures	Understanding of: School context, including external links. Structure and layout of School	To be aware of staff roles & responsibilities, Enable networking and sharing of information	Induction and on the job experience
	Working knowledge of: H & S, Data protection, DDA, CCC Financial Regulations, Personnel procedures, Child Protection, School policies and procedures	To ensure compliance and respond to changes in policy	On the job experience

How long would it take for a jobholder to become fully operational? Within a few months, the job holder should be operating pupil, financial and personnel systems, but it would take a year to experience the full academic year and financial cycle and acquire the specific local and Council knowledge and develop range of contacts.

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 Best Value: The job holder upholds the school and county's commitment to best value by sourcing cost effective supplies and services through research and fact finding and analysis of the various options to ensure that value for money is obtained.

Example: The jobholder organizes the school calendar of events, schools admissions, visits by professionals and the Head teacher's diary thus ensuring that all events run smoothly, that all the necessary documentation is sent out and returned for each event, that regulations and timescales are adhered to, consents obtained and accurate and appropriate records are maintained.

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

Example Budget setting cycle: When setting the budget the jobholder models different scenarios and endeavours to make plans fit the monies available. Once the budget is set the jobholder constantly monitors expenditure against plans and reconciles against records, highlighting and pursuing correction of any discrepancies, making regular reports to governors and carrying out end of year processes including calculation of projected out-turn.

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

Annual

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

Mental Skill	Why Needed?
Judgement	Determining best value, making recommendations to Governors related to budgets. Establishing when a complaint can be dealt with by the jobholder and when referral is necessary
Analytical	Monitoring and reconciliation of budget

	statements against local records
Fact finding and problem solving	Determining where cash/financial errors have occurred and taking steps to have them rectified. Adapting systems to enable accurate record keeping and statistical returns
Organisational/Planning	To co-ordinate cycle of events, ensuring all documentation, notifications etc are in place To service governors meetings, send out correct documents to determined timescales
Creativity	Development of systems to improve efficiency of administrative procedures

7 INTERPERSONAL AND COMMUNICATION SKILLS ESSENTIAL FOR THE JOB

Skill	Used for?	With whom?
Written skills – some information is sensitive and confidential	<ul style="list-style-type: none"> • Compose letters and newsletters • Take messages • Set up diary/calendar schedule • Prepare finance reports • Type up minutes 	Parents, governors, staff, outside agencies, Head teacher,
Oral skills – tact, diplomacy and sensitivity required when dealing with parents who may be upset or angry	<ul style="list-style-type: none"> • Respond to telephone calls and receive visitors to reception, checking ID and ensuring signing in procedures carried out • Give precise and accurate instructions, resolve problems • Obtain and give information • Liaison on behalf of school 	Pupils, parents, staff, professionals, education staff, transport drivers, contractors, suppliers, governors, general public, hirers of school facilities
Supervisory	<ul style="list-style-type: none"> • Recruitment of clerical / non teaching staff • Induction and on the job training • Day to day supervision • Appraisal • Interviews 	Clerical assistants, supply staff, volunteers, work experience students, other non teaching staff
Persuasion and negotiation	<ul style="list-style-type: none"> • Obtain best price, timescales, after sales service • Obtain the services of supply and replacement staff • Obtain services of a 	Contractors, suppliers, outside agencies, supply staff

	contractor	
Listening and giving advice	<ul style="list-style-type: none"> Advise on procedural personnel issues (within remit) Servicing of governors and other meetings 	School staff, governors

8 PHYSICAL SKILLS ESSENTIAL FOR THE JOB

Physical skill	Used for?	Any precision/speed requirements?
Hand/eye co-ordination and dexterity	Keyboard skills – to input accurate data, maintain records, word process documents – fundamental to job	Accuracy

9 INITIATIVE AND INDEPENDENCE

Allocation of work

a) **How is work allocated to the jobholder?** Most routine work is cyclical with known deadlines, other work is reactive to issues as they arise – telephone, incidents, staff requests, new appointments etc.

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

Daily , Weekly, Monthly, ½ Termly and termly, Annual
Reactive work, as and when basis

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)

Job holder makes suggestions to Head Teacher re changes to school procedures and policies that directly affect the administrative function.
Daily work practices can be changed by job holder in consultation with the administrative team.

to allocate their time to duties?

The jobholder is able to prioritise own work subject to school requirements, known priorities and deadlines.

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

School policies and procedures
Financial Regulations , procedures and guidelines
Personnel policies and Handbook
Health and Safety
Guidance from Head Teacher or Line Manager
DFEE guidance
Area Office support

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

Daily contact and close liaison with Head Teacher to discuss issues and agree action for jobholder or other parties. The Head teacher or Deputy Head are generally available to discuss issues as they arise and to give support and guidance but are contactable by phone for advice and guidance when away from the school.

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?

Expected problem	Nature of available guidance	Typical Frequency
Obtaining replacement staff on supply basis – job holder makes contact from a list of supply staff.	Initiative, experience, precedents, knowledge of local sources	
Attendance register checks – the jobholder would take appropriate action and notify appropriate people (parent, EWO, SENCO, Social Services etc) if a child is absent	Initiative, precedents, experience, knowledge of system, expectations, parents, pupils	Daily
If a parent has a query related to free school meals or school visits financial assistance – the job holder would give advice or refer to relevant person	Initiative, precedents, experience, knowledge of procedures	Few times a month
Unexpected problem	Nature of available guidance	Typical Frequency
School transport problems – eg a school trip returning	Initiative, experience,	Rare

significantly later than expected- would contact parents to advise them		
Parental complaints – the jobholder is the first point of contact and would take initial action, resolve as far as possible, and refer if insistent or difficult.	Initiative, experience, precedents, knowledge of parents	Few times weekly

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

Problem or decision	Point of referral	Typical Frequency
Complaint re member of staff or parental concerns and complaints about curriculum issues	Immediate to Headteacher	Few times a year
Requests from member of staff for major or unusual expenditure that doesn't fall within expenditure guidelines	To Headteacher for approval	Few times a year

10 PHYSICAL DEMANDS

Physical Demand	Typical Duration	How often?	Other details (eg how heavy?)
Sitting at work station to use PC plus other normal office demands such as filing etc.		Throughout working day	
Lifting, moving and carrying of deliveries and stationery	Few mins	Few times a week	

11 MENTAL DEMANDS OF THE JOB

Nature of task	Mental Demand	Duration	Frequency
<ul style="list-style-type: none"> Costing and calculating various models for budget Monitoring and checking budget 	Concentration, accuracy & attention to detail, awareness &		

statements including year end, following up discrepancies <ul style="list-style-type: none"> • Maintaining financial and other records including data entry • Producing financial & statistical reports for govs., DFEE, LEA • Reconciliation of imprest • Cash handling • Processing invoices • Completion of staffing forms • Composing letters & newsletters • Administration of recruitment process including undertaking required checks • Attendance at meetings and minute taking • Checking daily attendance register & taking appropriate action 	alertness Assessing situations before taking action. Listening and interpreting information		
Reception of visitors and responding to phone calls	Awareness, alertness to H & S and security issues, confidentiality of information		

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 – inherent part of the job	From phone, callers, pupils, staff – the jobholder often has to leave job in hand to deal with new demand		Throughout working day
Deadlines	Monthly payroll documentation Budget cycle, year end etc. Pupil statistical returns eg PLASC Parental consents (for visits, medicals etc) Governor meeting cycle Examination entries		
Conflicting demands	Balancing demands from staff and pupils requiring information and advice with routine office work. The jobholder constantly has to switch and juggle tasks and multitask		

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

12 EMOTIONAL DEMANDS

Nature of the task being performed by jobholder.	Behaviour / source of the emotional demand	Frequency (per day/wk/ month)
Typing up reports and entering of data re: staff or pupils that is highly confidential	Privy to sensitive and confidential information and awareness for the need for strict confidentiality.	Few times a year

13 WORKING CONDITIONS

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

Location of work	Proportion of time
Office within 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?
Verbal abuse from parents – either face to face or telephone	Few mins	Occasional

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

Not Applicable

OTHER CONSIDERATIONS

If you feel that there are other, special considerations which might affect the evaluation of this job, please give details.

There is a need to keep up to date with new procedures, education initiatives and other imposed changes to ways of working.