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Leicestershire
County Council



JOB DESCRIPTION

School/College:

Job Title: Administration Manager / School Secretary / Bursar

Grade: 8

Post Number:

Responsible To: *(Line Manager job title required)*

**Key Relationships/
Liaison with:**

Job Purpose: To assist in the development and implementation of effective administrative and financial support within the school, ensuring all procedures are carried out effectively and efficiently and in accordance with school / LA / Trust policies. May act as line manager, or otherwise provide support and guidance for junior administration staff.

Occupational Standards: Business and Administration Level 4

MAIN DUTIES AND RESPONSIBILITIES:

1. To communicate effectively with parents/carers, the LA / Academy Trust, suppliers and other users of the school's facilities, dealing effectively with the majority of non-specialist queries, ensuring that effective procedures are in place to welcome and manage visitors in compliance with health and safety and safeguarding requirements.
2. To deal with written correspondence in an effective manner, opening, filtering, sorting and distributing incoming post and e-mails as appropriate, to prepare and send outgoing correspondence and responses to enquiries that do not require the individual attention of a specific member of staff.
3. To ensure that the office filing system is kept current and up to date, routinely archiving/ disposing of historic documents in accordance with the school's document retention schedule and established good practice.
4. To provide effective secretarial support as required, including management of the head teacher's / school diary, scheduling and arranging meetings, managing staff and room availability and taking minutes at formal meetings where the need for accuracy and the recording of decisions is important.
5. To use office software and equipment to create / produce a wide range of documents, including designing promotional material and creating documents where there may be a requirement for collation and/or interpretation of more complex information or liaison with others.
6. To source suppliers and obtain quotes for non-routine purchases, after determining requirements from relevant staff, and to raise orders, including official orders when authorised to do so.

7. To check deliveries to the school against the delivery note / order, noting any discrepancies and reporting them to the supplier in a timely manner. (Note: if the post holder raised the order or will be processing payment then they should delegate the checking of the delivery to a different person)
8. To maintain office software, carrying out system upgrades and year-end procedures on information management systems in accordance with published guidance (e.g. from LEAMIS)
9. To maintain and manage electronic and manual records, and use appropriate software (database / spreadsheets) in order to process data and produce, analyse and interpret reports in order to support decision making by senior leaders and governors.
10. To liaise with the School Admissions Service regarding the annual intake of new pupils to the school, mid-term admissions and pupils leaving the school.
11. To complete statutory and non-statutory returns, ensuring that they are accurate and are submitted in a timely manner (e.g. school census, monthly absence return, etc)
12. To support the development of administrative and financial procedures and systems within the school.
13. To collect and bank all monies
14. To manage the petty cash account, ensuring that all payments are authorised, supported by appropriate documentation (i.e. VAT receipts), and signed for, and arranging for the cash float to be topped up as required, and reconciling transactions on the finance management software.
15. To manage ordering processes to ensure that resources are available when required and that ordering is tightly monitored
16. To maintain accurate records of all financial transactions, electronically and manually, ensuring that all transactions are supported by appropriate documentation.
17. To process all invoices for payment, checking them for accuracy, taking appropriate steps to resolve any queries and ensuring that they are authorised, charged to the correct budget and paid on time, with the payment authorised in accordance with the bank mandate.
18. To reconcile the bank statement on a regular basis.
19. To reconcile the monthly payroll reports in a timely manner, dealing with any wage queries promptly as soon as they arise.
20. To process complex financial documents and information for internal and external bodies, such as debtor accounts, VAT documentation, etc.
21. To liaise directly with parents who may owe money to the school to seek payment, including agreeing payment plans where appropriate, referring persistent non-payment to the finance manager / business manager / head teacher.
22. To contribute to the preparation of the school budget, assisting with forecasting costs for staffing and essential / compulsory services (e.g. insurance, utilities, etc), using planning tools provided.
23. To monitor budgets, produce expenditure reports for budget holders as required, and prepare budget monitoring reports regularly for the SLT and finance committee, attending meetings if requested.

24. To assist in the preparation of financial reports and returns (statutory and non-statutory) as requested by the LA / Academy Trust, Auditors / EFA / DfE.
25. To maintain accurate employee records, both electronic and manual, ensuring that any changes to contracts / pay are processed in a timely manner to meet payroll deadlines, and that all necessary pre-employment checks are satisfactorily completed
26. To record and monitor staff absence, ensuring that medical certificates are requested where necessary, absence information is reported to payroll and absence insurance claims are submitted in accordance with the requirements of the policy.
27. To provide general administrative support in respect of HR matters, including recruitment and payroll administration, dealing with general staffing issues, and note taking during HR casework meetings if required.
28. To manage requests for lettings of the school premises, ensuring availability of premises staff and facilities and calculating costs based on an agreed scale of charges and invoicing for payment.
29. Any other duties, commensurate with the grade, for which the post holder has appropriate skills / training, as may be required from time to time.

SPECIAL FACTORS:

(Please delete/add where appropriate)

Subject to the duration of the need, the special conditions given below apply :

- (a) The nature of the work may involve the post holder carrying out work outside of normal working hours.
- (b) The postholder may be required to attend, from time to time, training courses, conferences, seminars or other meetings as required by his/her own training needs and the needs of the school.
- (c) Expenses will be paid in accordance with the Local Conditions of Service.
- (d) This post is eligible for a DBS check under the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (i.e. it involves certain activities in relation to children and/or adults) and defined as regulated activity under Part 1 of the Safeguarding Vulnerable Groups Act 2006 before the coming into force of section 64 of the Protection of Freedoms Act 2012 on 10th September 2012. Therefore a **DBS enhanced check is an essential requirement.**

This job description sets out the duties and responsibilities of the post at the time when it was drawn up. Such duties and responsibilities may vary from time to time without changing the general character of the duties or the level of responsibility entailed. Such variations are a common occurrence and cannot themselves justify a reconsideration of the grading of the post.

Leicestershire County Council is seeking to promote the employment of disabled people and will make any adjustments considered reasonable to the above duties under the terms of the Equality Act 2010 to accommodate a suitable disabled candidate.

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PERSON SPECIFICATION

School/College:

Job Title: Administration Manager / School Secretary / Bursar

Grade: 8

Post Number:

	Essential	Desirable	How assessed
<p>Qualifications</p> <ul style="list-style-type: none"> Level 2 qualifications in maths/numeracy and English/literacy. Level 3 qualification in business and administration, or evidence of equivalent experience 	<p>✓</p> <p>✓</p>		<p>App/Doc</p> <p>App/Doc</p>
<p>Experience</p> <ul style="list-style-type: none"> Experience of working in a busy office environment, carrying out a range of administrative and financial tasks Experience of carrying out financial procedures accurately, including invoice processing, bank and payroll reconciliation and VAT claims. Experience of budget monitoring and reporting. Experience of working in a school office. Some supervisory experience. Experience of using information management systems and finance software. Experience using SIMS and FMS. 	<p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>App/Int</p> <p>App/Int/Test</p> <p>App/Int/Test</p> <p>App</p> <p>App/Int</p> <p>App</p> <p>App</p>
<p>Knowledge</p> <ul style="list-style-type: none"> Understanding of the importance of confidentiality and an appreciation of the implications of the Data Protection Act. Understanding of the context in which schools operate. 	<p>✓</p>	<p>✓</p>	<p>App/Int</p> <p>App/Int</p>

	Essential	Desirable	How assessed
<ul style="list-style-type: none"> Awareness of the financial regulations that relate to schools/academies. 		✓	App/Int
<ul style="list-style-type: none"> An understanding of health and safety issues relevant to the post. 	✓		App/Int
Skills/Attributes <ul style="list-style-type: none"> Ability to work accurately under pressure, managing your own workload in order to meet deadlines. Excellent ICT skills, along with the ability to make effective use of a range of ICT software in order to fulfil the requirements of the role. Ability to analyse data. Ability to deal with all but the most complex/challenging problems, and take appropriate action. Excellent written and oral communication skills Excellent interpersonal skills with the ability to relate well to children and adults. Able to operate effectively with minimum supervision. Able to support/direct the work of junior staff. 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ ✓ ✓ 		<ul style="list-style-type: none"> App/Int/Test /Ref App/Int/Test App/Test Int/Test App/Int/Test Int App/Int/Ref App/Int
General Circumstances <ul style="list-style-type: none"> Evidence of regular attendance at work An understanding of, and commitment to, Equal Opportunities, and the ability to apply this in day-to-day situations. Willingness to undertake training. 	<ul style="list-style-type: none"> ✓ ✓ ✓ 		<ul style="list-style-type: none"> Ref App/Int App/Int
Factors not already covered <ul style="list-style-type: none"> Must be able to perform all duties and tasks, with reasonable adjustment where appropriate, in accordance with the provisions of the Equality Act 2010 	✓		App/Int/Med

App = Application Form
Test = Test

Int = Interview

Pre = Presentation

Med = Medical Questionnaire

Doc = Documentary Evidence (E.g., Certificates)