Job Description

Job Title	Finance and Admissions Officer
Working Hours:	35 hours per week, term-time only plus 5 days
Department:	Administration
School:	John Perry Primary School
Reports to:	School Business Manager (SBM) and Senior Admin & Admissions Officer
Contract type	Permanent
Responsible for:	N/A

Job Description: Finance & Admissions Officer

John Perry Primary School is committed to creating a diverse workforce. We will consider all qualified applicants for employment without regard to sex, race, religion, belief, sexual orientation, gender reassignment, pregnancy, maternity, age, disability, marriage or civil partnership.

Main purpose
The Finance & Admissions Officer will provide efficient and effective finance, admissions and administrative support to the School Business Manager (SBM), contributing to the effective operation and management of the school. The post holder will support the delivery of the school's Finance & Resources, Admissions and Administration functions, while having day-to-day responsibility for the administration and coordination of the admissions process.

The post holder will support the effective and efficient use of school resources, maintain accurate and timely financial, admissions and pupil records, and provide a professional, friendly and responsive service to parents, pupils, staff, visitors and external agencies. They will promote high standards of business administration and professional ethos, ensuring all duties are carried out in accordance with school policies, financial procedures, admissions arrangements, statutory requirements and confidentiality requirements.

Key duties and responsibilities

Financial Administration

- Assist with the ordering, processing and payment of all goods and services provided to the school, ensuring agreed procedures are followed.
- Prepare and process invoices and assist with the collection of fees, charges and other monies owed to the school.
- Monitor and follow up outstanding debts, including staff dinner money and other school-related payments, escalating matters to the SBM where appropriate.
- Receive, record, safeguard and bank monies received by the school in accordance with agreed financial procedures.
- Maintain accurate and up-to-date financial records and supporting documentation, ensuring records are securely filed and readily available for audit.
- Process financial month-end procedures and assist with budget monitoring and the preparation of management accounts and financial information for budget holders.
- Assist the SBM with the preparation and monitoring of the annual budget, including estimates of income and expenditure.

- Assist with the preparation of financial returns for the Department for Education, Local Authority and other relevant bodies within statutory deadlines, including capital and leases, quarterly and year-end returns.
- Assist with the administration of audit procedures and the annual asset audit, maintaining appropriate records and documentation.
- Administer the School Fund in accordance with Local Authority and school regulations.

Procurement & Resources

- Assist with procurement and purchasing, including obtaining quotations and maintaining appropriate records, ensuring compliance with school procedures, best-value principles and value for money.
- Assist with monitoring expenditure, identifying potential savings and efficiencies, and supporting the effective management of school resources.
- Assist with grant applications, gifts, donations and other income-generating opportunities, supporting the SBM in maximising income within the ethos and objectives of the school.

Financial Systems

- Provide support to the SBM in the use and administration of the school's financial management systems, including Arbor Finance.
- Maintain accurate financial information and assist with resolving system queries, liaising with the Local Authority, suppliers and other relevant organisations as required.
- Support the SBM with financial management information and benchmarking tools to identify trends, areas of relative spend and opportunities to improve value for money.

ParentPay & Payments

- Assist with the administration of ParentPay, including payments, refunds, balances and related queries, and resolve issues where appropriate.
- Administer payments relating to school activities, trips, clubs and other services, maintaining accurate records and following up outstanding payments.

Agency Staff & Payroll Support

- Book agency staff as authorised, process and verify timesheets, and liaise with agencies regarding bookings, payments and queries.
- Provide administrative support to the SBM in relation to payroll and staffing-related financial information as required.

Admissions

- Responsibility for the administration and coordination of the school's admissions process.
- Act as a point of contact for prospective parents/carers from initial enquiry through to enrolment.
- Administer admissions in accordance with the school's published admissions arrangements, Local Authority requirements and relevant school procedures.
- Process applications for Nursery, Reception, in-year admissions and other points of entry as applicable.
- Maintain accurate records of applications, offers, acceptances, refusals, waiting lists, transfers and leavers.
- Check admission documentation and follow up missing information, ensuring that records are complete and accurate.

- Arrange and coordinate visits for prospective families and provide appropriate information about the school.
- Prepare and issue admissions correspondence, welcome information, forms and admission packs accurately and within required timescales.
- Coordinate arrangements for new starters, liaising with teachers, leadership and relevant support staff to ensure a smooth transition into school.
- Support the administration of appeals, out-of-year-group applications and other admission matters, referring complex or sensitive issues to the appropriate senior officer.
- Support Year 6 and secondary transfer administration and ensure relevant information is completed and submitted within required timescales.
- Coordinate pupil transfers and leavers, including the secure transfer of pupil records and Common Transfer Files (CTFs), where applicable.
- Liaise with the Local Authority and other relevant agencies regarding admissions, pupil movements and changes to the school roll.
- Maintain an accurate overview of pupil numbers, available places and waiting lists.
- Provide regular admissions and pupil-number information to the SBM and leadership team as required.
- Ensure that admissions procedures are administered consistently, efficiently and in accordance with agreed timescales.
- Identify and escalate any admissions issues that require management or Local Authority intervention.

Pupil Records, MIS & DATA

- Maintain accurate pupil records, including contact details, admission information, permissions and relevant documentation.
- Update the school's Management Information System (MIS) and other relevant systems promptly following admissions, transfers, changes and leavers.
- Ensure that pupil information is accurate, complete and up to date.
- Support the end-of-year MIS rollover and preparation of pupil records for the new academic year.
- Assist with pupil census returns and other statutory or school data submissions as directed.
- Produce admissions, pupil-number and related reports for the SBM and leadership team.
- Maintain confidential records in accordance with data protection requirements, the school's retention arrangements and information-security procedures.
- Ensure that pupil records are securely stored and transferred in accordance with school procedures.
- Liaise with relevant staff to ensure that changes to pupil information are communicated appropriately.

Administration and School Operations

- Assist with the administration of ICT facilities, reprographics, records, telephones and other administrative systems.
- Use Word, Excel, the school email system, MIS and other relevant systems effectively.
- Maintain accurate electronic and paper-based records.
- Ensure that documents are appropriately filed and readily retrievable.

- Assist with photocopying, scanning and distribution of documents as required.
- Assist the SBM in obtaining necessary licences, permissions and registrations and ensuring that they remain relevant and current.
- Assist with the administration of school educational visits as required.
- Assist with the organisation and administration of whole-school events.
- Maintain records of Business Interest Forms and assist with the annual update process.
- Liaise with staff, parents, suppliers, Local Authority officers and other external organisations as required.

Communication and Customer Service

- Provide a professional, helpful and welcoming service to parents/carers, prospective families, pupils, visitors and members of the public.
- Act as an approachable and professional first point of contact for admissions and general enquiries.
- Answer telephone calls politely and professionally, dealing with general enquiries and attempting to resolve queries where appropriate.
- Respond to admissions and general enquiries by telephone, email and in person, ensuring enquiries are answered promptly or referred appropriately.
- Communicate clearly with families regarding admission requirements, documentation, school visits, start dates and transition arrangements.
- Prepare and update standard admissions communications, information packs, forms and parent correspondence.
- Support approved school communication systems where required.
- Deal sensitively and professionally with complaints or concerns, escalating matters appropriately.
- Liaise effectively with teachers, leadership, office colleagues, Local Authority officers and other external agencies.
- Ensure that information provided to parents, prospective families and visitors is accurate, consistent and in accordance with school policies.
- Maintain a high standard of confidentiality, professionalism and customer service at all times.

Information, Records and Confidentiality

- Ensure that confidential financial, pupil, family and staff information is handled appropriately.
- Maintain records in accordance with school policies, data protection requirements and information-management procedures.
- Ensure that information is shared only with authorised individuals and organisations.
- Handle sensitive information with discretion and professionalism at all times.
- Ensure that all financial and admissions documentation is stored securely and can be retrieved when required.
- Comply with the school's information security and document retention procedures.

General Responsibilities

- Comply with all school policies and procedures, particularly those relating to finance, admissions, safeguarding, health and safety, data protection, confidentiality and equality.

- Contribute positively to the school's ethos and promote high standards of professionalism.
- Work collaboratively with colleagues across the school to ensure effective financial, admissions and administrative services.
- Attend relevant meetings, training and professional development activities as required.
- Keep knowledge and skills up to date, particularly in relation to financial systems, admissions procedures, MIS and relevant legislation and guidance.
- Promote the safeguarding and welfare of children and young people in accordance with the school's safeguarding policies and procedures.
- Ensure that all duties are undertaken with due regard to equality, diversity and inclusion.
- Undertake other reasonable duties commensurate with the level and responsibilities of the post, as directed by the SBM or Headteacher.

The Finance & Admissions Officer will be accountable to the School Business Manager for the effective and timely delivery of the responsibilities outlined within this job description.

The post holder will recognise matters requiring management intervention and ensure that these are escalated promptly and appropriately.

This job description is illustrative of the general nature and level of responsibility of the role and is not an exhaustive list of duties. The postholder may be required to undertake other appropriate duties within the context of the role and grade, as directed by the Headteacher or line manager.

Post Holder's Name: _____

Post Holder's Signature: _____

Date: _____

Headteacher / line manager's Name: _____

Headteacher / line manager's signature: _____

Date: _____

Person Specification: Finance & Admissions Officer

Criteria	Essential	Desirable
Qualifications & Knowledge	Level 3 qualification in Business Administration, Finance, Accounting or equivalent experience; good English and mathematics	Relevant school administration, finance, admissions, safeguarding or data protection training.
Finance	Experience of financial administration, including orders, invoices, payments and maintaining accurate financial records; good numerical skills.	School finance, budget monitoring, procurement or audit experience.
Admissions & Pupil Records	Experience of processing applications, maintaining accurate records and using databases/MIS; able to meet deadlines and learn new systems.	School admissions experience, including waiting lists, appeals, transfers, CTFs or Local Authority processes.
IT & Systems	Confident use of Microsoft Office, particularly Word and Excel, email, spreadsheets and databases.	Experience of Arbor Finance, Arbor MIS, Access, ParentPay or similar systems.
Communication & Customer Service	Excellent written and verbal communication skills; professional, approachable and able to deal sensitively with parents/carers, pupils, colleagues and visitors.	Experience of liaising with Local Authority officers, suppliers and external agencies.
Organisation	Highly organised, accurate and able to prioritise, manage competing demands and meet deadlines in a busy environment.	Experience of managing a high-volume administrative workload.
Safeguarding & Confidentiality	Understanding of safeguarding, confidentiality and data protection, with the ability to handle sensitive information appropriately.	Relevant safeguarding or data protection training
Problem Solving & Initiative	Reliable, proactive, discreet, flexible and calm under pressure; strong attention to detail and able to work effectively as part of a team.	Positive approach to change and service improvement
Commitment to the School	Commitment to the ethos and values of John Perry Primary School and to providing an efficient, professional and high-quality service; willingness to undertake relevant training.	Experience of working in a primary school or education setting.