

## Role Profile

### Purchasing and Finance Assistant

<b>Role Summary:</b>	<p>The Purchasing and Finance Assistant will provide support services to the school in the procurement of goods and services ensuring that the school's financial procedures are followed and that the process from order through to invoice is monitored and managed.</p> <p>Direct support will also be provided to the Finance Manager in assisting with key financial tasks.</p> <p>Deputise for the school receptionist in the front office</p>
<b>Site:</b>	Undershaw and Arts and Media Centre sites
<b>Annual Salary:</b>	Support Band 5 £26,777 - £28,686 (actual £12,578 - £16,843)
<b>Hours:</b>	<p>20 – 25 hours per week, term time only</p> <p>Our school hours are: 8.20am - 4.30pm Monday to Thursday and 8.20 - 3.40pm Friday.</p>
<b>Terms:</b>	Permanent contract with 6 month probationary review
<b>Responsible to:</b>	Finance Manager

#### Duties and Responsibilities:

##### Procurement:

- To work with the Finance Manager, IT providers and Premises Manager to assist with the purchasing of school resources to include IT, outside resources, fixtures and fittings.
- Receiving and processing of purchasing requests from staff via the school online systems: liaising with new suppliers, placing orders, receiving and good receipting deliveries in line with school policy
- To ensure the process from ordering to invoicing is monitored, with problems managed and resolved swiftly.
- To manage the consumable curriculum supplies budget and audit, monitor and maintain these resources.
- To manage the organisation and maintenance of school consumable resources to ensure appropriate accessibility, availability and storage.
- Checking budget allocations to ensure sufficient budget is available for each request.
- Ensure products/orders and suppliers fulfil the principles of Best Value
- Ensure timely notification of order arrival to requester
- To ensure that the school's existing resources are properly organised and maintained to support teachers in delivering the curriculum to students.
- Manage individual training course requests, working with provider to fulfil the booking requirements.
- Monitor completion of training ensuring that any certificates received are sent to the delegate and to the HR Manager.
- Monitoring and managing outstanding unbilled purchase orders regularly
- Monitor the use of and management of ordering printer consumables
- Ensure that the Stationery Cupboard is kept tidy, and resources are easy to access.

**Finance:**

- Matching purchase order invoices with receipted purchase orders and processing the invoice on Xero; managing any queries and pushing matched invoices for approval.
- Processing staff expense claims
- Processing credit card transactions
- Reconciling monthly credit card statements, in conjunction with the Finance Manager.
- Assist the Finance Manager with setting up new users on ApprovalMax assisting staff with queries.

**Assistance with Front of House School Office at Undershaw:**

- To deputise for the Undershaw school receptionist
- To ensure that all students, staff and visitors are signed in/out correctly following required safeguarding procedures.
- To ensure that the office fire alarm protocol is adhered to including fire evacuation procedures.
- To communicate effectively with parents, visitors and staff upholding professionalism and confidentiality at all times
- Ensure the front office is kept tidy and presentable.

**General Commitment to the Role:**

- Willingness to conform to the school's aim and policies
- Flexibility in the approach to deal with emergency situations
- Awareness and understanding of Safeguarding and Child Protection issues
- Awareness of Health & Safety and Equality of Opportunity in the workplace
- Actively support in the Safeguarding and Wellbeing of all stakeholders
- Ensure compliance with General Data Protection Regulation (GDPR)
- To carry out any other tasks requested by the Headteacher.

**Equal Opportunities and School Vision:**

- Ensure and display commitment to the implementation of the school vision and ethos.
- Always remain committed to the school's policies and ensure these are followed.
- Support and participate in raising of levels of achievement for all our students.

**Safeguarding:**

- Set the highest standard of example in terms of safeguarding and professional behaviours in line with the most up to date guidance, including KCSIE and WTTSC, and supporting with embedding these within the culture of the school.

**Note:** this job description is not your contract of employment, or any part of it. It has been prepared only for the purpose of school organisation and may change either as your contract changes or as the organisation of the school is changed. Nothing will be changed without consultation. This document must not be altered once it has been signed but will be reviewed annually.

**Signature of Post Holder:****Date:****Signature of Headteacher:****Date:**

## Person specification- Purchasing and Finance Assistant

	Essential	Desirable
<b>Qualifications</b>	GCSEs (or equivalent) in Maths and English (Grade C/4 or above).	Relevant qualification in finance, accounting, or procurement (e.g., AAT Level 2 or 3).
<b>Experience</b>	<p>Experience in a finance or purchasing role.</p> <p>Managing purchase orders, invoices, and financial transactions.</p> <p>Experience using financial management software (e.g., Xero, Approval Max, Sage, Quickbooks etc.).</p>	Experience working in a school or educational setting.
<b>Knowledge</b>	<p>Proficiency in Microsoft Office Suite, particularly Excel.</p> <p>Awareness of safeguarding policies and procedures or willingness to learn.</p>	Understanding of financial and procurement regulations, including VAT and tax compliance.
<b>Skills</b>	<p>Ability to create financial reports</p> <p>Strong organisational skills and attention to detail.</p> <p>Effective communication skills, both written and verbal.</p> <p>Ability to prioritise workload and meet deadlines under pressure.</p>	
<b>Personal Attributes</b>	<p>Professional, proactive, and trustworthy.</p> <p>High level of integrity and confidentiality.</p> <p>Ability to work effectively as part of a team and independently.</p>	