

THE ASPIRE EDUCATIONAL TRUST

JOB TITLE	Clerical Officer - Primary Academy	JOB REF NO	ASPIRE 5008 Grade 3
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BASIC JOB PURPOSE

To provide general clerical support to the school.

MAIN RESPONSIBILITIES	
1.	Provide general clerical support for the school including word processing, photocopying, filing, collation of information, distribution of mail etc to ensure the efficient and timely provision of information.
2.	Deal with telephone and face to face enquiries to ensure that all calls/visitors are handled efficiently and effectively and good relations fostered.
3.	Collect and count 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.
4.	Maintain and update school files, manual and computer, including staff and pupil records to ensure that accurate information is stored securely and available for use by appropriate persons.
5.	Process and raise invoices to ensure that bills are paid accurately and promptly and accurate up to date financial records maintained.
6.	Process and compile documentation for the development of individual pupil reports.
7.	Receive goods and other items (including pupil's personal possessions) and ensure they get to the correct destination.
Notwithstanding the detail in this job description, in accordance with the Trust's Flexibility Policy the job holder will undertake such work as may be determined by the Principal/Board of Trustees 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 job holder

Not Applicable

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

Not Applicable

What does the supervision of these employees involve?

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>
	Newly appointed office staff	Office tasks	

What does the supervision of these people involve? Advice and guidance on use of office equipment.

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?
Cash handling and processing: <ul style="list-style-type: none">Collects cash and cheques – e.g. dinner money, school trip monies, school fund, counts and reconciles, maintains records and prepares for banking		

<p>Processing invoices:</p> <ul style="list-style-type: none"> • Processing of invoices for goods and services received • Raising of external invoices or internal invoices (inter academy transfer requests) for services provided 		
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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?
<p>General office equipment: PC, printer, fax, laminator, photocopier, shredder etc</p>	<p>Shared responsibility for: Safe use Resolving straightforward break-downs Demonstrating correct usage to new staff</p>	<p>Daily</p>
<p>Stock:</p>	<p>Checks goods received Maintains adequate stocks of office stationery and first aid supplies</p>	
<p>Pupils' possessions</p>	<p>Shared responsibility for safekeeping of inhalers and medication</p>	<p>Daily</p>
<p>Records: manual and computer including: Pupil data – SIMS database and individual files</p> <p>Financial Records - dinner monies, school fund Visitors and staff signing in book</p> <p>School General Filing system including staff and pupil files (Confidential nature)</p> <p>Word Processed Documents: Forms, letters, agendas, diary sheets, teaching materials,</p>	<p>Sets up new records, data entry, maintains accurate records, updates, collates data for statistical returns, pupil reports, annual reviews etc. Confidentiality and security</p> <p>Maintains accurate records and updates, safekeeping of information</p> <p>Sets up new files and maintains system</p> <p>Produces accurate, well presented documents in required format. Some are of a confidential nature.</p>	<p>Daily</p> <p>Daily</p> <p>Daily</p> <p>Daily</p>

reports		
Incoming Mail	Opens, sorts and distributes	Daily

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>
First point of contact - receives all visitors to school and responds to wide range of telephone and drop-in enquiries	Pupils, parents, staff, visitors, suppliers, Trustees, Local Governors, sales reps., LA officials, external organizations, other professionals	Access to or provision of accurate school information
School Security – operation of door entry system	Staff, pupils, visitors	School security and safety is maintained
Administering of medicine and inhalers (with parental permission)	Pupils, parents, teachers	Timely administration of essential medication
Provision of document copying service, production of teaching resources, typing, laminating etc.	Teachers and support staff	Able to spend more time in the classroom

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?
Qualifications, experience and specialist knowledge	Understanding of office systems and procedures – filing, record keeping and organizational skills Good standards of spelling, grammar & punctuation + arithmetical skills	To maintain office systems, keep accurate records, word process, handle cash, check invoices	GCSE level or equivalent + office/administrative experience
ICT and admin systems and packages	Keyboard skills + knowledge of MS Office applications including Outlook and Internet, SIMS database, Financial management system	To word process, maintain accurate records, obtain information.	Experience and short training courses
Equipment	Use of general office equipment and PC's & printers	To use and carry out day to day maintenance	Experience and on the job training
Policies and procedures	Working knowledge of school policies and procedures, and relevant Trust guidelines including cash handling, Fire and Health and Safety, Data Protection	To ensure compliance by self and others provision of accurate information	Induction, experience on the job
Organisational and service based knowledge	Understanding of: School context, structure and layout of School	To be aware of staff roles & responsibilities,	Induction and on the job experience
	Understanding of Annual Review Process	To process documentation	On the job experience
	General knowledge of Education and other departments at Trust and LA level	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 week should be able to carry out basic routine tasks, filing, word processing etc. but a few months to understand the bigger picture and assimilate school specific knowledge.

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 Counting and reconciliation of cash receipts against records and checking and resolving any straightforward discrepancies.

Example Checking of invoices for accuracy against local records.

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

Example: Dealing with enquiries either from telephone calls or visitors to the school, giving appropriate response, advice or information or referral to appropriate person or the taking of clear messages.

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

Daily

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

Mental Skill	Why Needed?
Fact finding	Careful questioning of callers to ensure enquiry is dealt with appropriately Gathering and collation of data for production of statistical and other reports
Organisational	Maintenance of office systems and procedures
Judgment	Responding to enquiries, determining who to transfer enquiry to Security issues Distribution of post
Creative	Production of attractive school information and presentation of letters
Analytical	To find discrepancies between cash receipts and records

7 INTERPERSONAL AND COMMUNICATION SKILLS ESSENTIAL FOR THE JOB

Skill	Used for?	With whom?
Written: need for clarity	<ul style="list-style-type: none"> To write messages Notes for parents To type correspondence, reports etc from copy correcting any grammatical errors Completion of Trust, LA & 	Principal, Staff, parents, Trust, LA, other organisations, Local Governors, local community, general public

	DfEE returns	
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"> • Listening to establish what enquirer wants • exchange of information • giving instructions • filtering telephone calls and redirecting to appropriate person • Front of House Public Relations Role • To make arrangements, collect and find out information on behalf of others 	Teachers, staff, pupils, parents, suppliers, visitors, Governors, sales reps., LA officials and support services e.g. Area Education Office, external organizations, other schools

8 PHYSICAL SKILLS ESSENTIAL FOR THE JOB

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

9 INITIATIVE AND INDEPENDENCE

Allocation of work

a) How is work allocated to the jobholder?

Mainly routine tasks and special ad hoc requests for work such as typing from Principal, Bursar, SMT or other teachers. Responsive to telephone and callers at reception. Some cyclical tasks such as dinner money collection and reconciliation.

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

There are mainly daily and weekly cycles, but with some tasks that arise monthly, termly and annually.

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)

Makes suggestions regarding improvement of work efficiency which are discussed with the Principal and Bursar before implementation.

to allocate their time to duties?

The jobholder is able to prioritise own work subject to school requirements, known priorities and deadlines. Work is directed by the Principal or Line Manager.

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

Trust/School policies and procedures, LA procedural guidelines and guidance from Principal or Line Manager.

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

Day to day supervision is carried out by the Line Manager or Principal who are generally available to discuss issues as they arise and to give support and guidance.

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
<ul style="list-style-type: none">• Completion of routine statistical returns• Reconciliation of cash and dealing with any discrepancies• Dealing with all straightforward incoming calls and visitors• Filtering of calls to Principal• Maintaining adequate stationery stocks	Procedures, experience, initiative, precedents	Daily
Unexpected problem	Nature of available guidance	Typical Frequency
<ul style="list-style-type: none">• School emergencies e.g. fire drills – ensures registers are taken out of building• Breakdown of office equipment	Initiative, precedents, experience, procedures	Few times a year

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
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<ul style="list-style-type: none"> • Complaints/parental concerns or upset/irate parents • Pupil security issues • Difficult visitors • All documents checked /signed by Principal 	Line Manager or Principal	Occasional Daily
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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	Daily	
Lifting, moving and carrying of deliveries and stationery	Few mins	Few times a month	

11 MENTAL DEMANDS OF THE JOB

Nature of task	Mental Demand	Duration	Frequency
<ul style="list-style-type: none"> • Invoice processing • Word processing and proof reading • Data collation • Cash handling • Routine clerical tasks, filing, copying etc • Maintaining records, data input 	Concentration, attention to detail, accuracy		
<ul style="list-style-type: none"> • Reception of visitors and telephone answering 	Sensory awareness, alertness, listening skills, attention		

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 & pupils each having their own priorities & deadlines.		
Deadlines	Annual reports Statistical returns e.g. PLASC Cash for banking 3 rd party imposed for specific tasks		

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

Not Applicable

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?
Parents who are offhand and curt, angry, upset demanding or emotional who may have complaints or concerns	Few mins.	Occasional

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

Not Applicable