

WILLOW GROVE PRIMARY SCHOOL



Finance Officer

Recruitment Pack 2026

Author: School Business Manager

Date: October 2026

Finance Officer Job Description

Job purpose:	To provide routine administrative and financial support to the School Business Manager, Headteacher and other members of the Senior Leadership Team.		
Reporting to:	School Business Manager, Headteacher		
Liaising with:	Headteacher, other members of staff – teaching and non-teaching, Governors, LA and DFES		
Grade of post:	G4 – Part time 15 hours per week, term time + 1 week.		
Disclosure level:	Enhanced	Gauge ref:	A23226

The Headteacher and Governors at Willow Grove Primary School are seeking the appointment of a highly motivated, organised and forward-thinking Finance Officer who can take post soon as possible.

At Willow Grove Primary School, we pride ourselves on providing a nurturing environment where every child is supported to reach their full potential. Our specialist school caters to pupils with Social, Emotional and Mental Health needs (SEMH). Willow Grove Primary School has adopted strong attachment and trauma-informed practices (ATP) as the basis for working with its pupils and we are looking to further develop our team with staff who have knowledge in this area.

We are looking for an experienced, highly motivated candidate who will work alongside the School Business Manager, Administration and Premises team to carry out day-to-day duties of the School Office, support the implementation of robust procedures and support the teaching and support staff as needed.

Job Outline

- To undertake a range of administrative, financial and IT based tasks including tasks relating to the use of school premises if required as directed by School Business Manager and Headteacher
- To use the school's finance system Arbor to complete day-to-day financial processes and reconciliation of accounts – including:
 - Raising purchase orders
 - Seeking approval of requisitions
 - Reviewing staff requests, producing and sharing monthly budget monitoring reports to budget holders
 - Ordering goods

- Checking deliveries and ensuring all goods have been received
- Reconciling bank statements, Direct Debit statements, Credit Card statements
- Completing monthly transaction reports and reconciliations
- To assist the School Business Manager with applications for grants/bids/other sources of income
- To work in line with the school's Scheme of Financial Administration (SOFA) to ensure that public funds are utilised in the most efficient, cost-effective way
- To support the Headteacher and School Business Manager to complete the annual School's Financial Value Standard (SFVS) return
- To support the School Business Manager to complete key processes such as month end, year-end, VAT submission, Consistent Financial Reporting (CFR) return
- To support the School Business Manager with annual budget preparation and review
- To produce a range of financial data and provide reports as required.
- To liaise with the Administration Officer to carry out annual data collection exercise at the beginning of each academic year, as well as continuously maintaining and updating records as required
- To maintain and update manual and computer records and management information systems, to produce relevant reports as requested.
- To support the Headteacher to produce school Newsletters, posters, flyers and other marketing information
- To undertake reception duties in the absence of the Administration Officer and to respond to general enquiries from staff, visitors and parents
- To liaise with third parties e.g. photographer, linked schools, contractors and parents to arrange site visits as authorised by the Headteacher or School Business Manager
- To take notes/minutes of meetings as required.

Other specific duties:

- To carry out duties in the most effective, efficient and economic manner available
- To continue personal development in the relevant area
- To participate in the staff review and development appraisal process
- To undertake pupil first aid/welfare duties including liaising with parents/carers and staff.

Health and Safety Training

- To undertake Health and Safety training on areas within the designated work area
- To undertake First Aid and Fire Warden training
- To undertake any training relevant to this role e.g. Safeguarding, PREVENT, Cyber Security, GDPR, Health & Safety, Fire Safety, Security Procedures. This list is not exhaustive.

SIGNATURES / AUTHORISATION

Job profiles are general, rather than explicitly describing any particular role and staff would not necessarily be expected to carry out all of the activities described. However staff may also be expected to undertake some duties which are not detailed in the job profile.

I/we agree that this job profile is an accurate reflection of the duties, skills and responsibilities of the post.

Signed Governors: _____ Date _____

Signed Headteacher: _____ Date _____

Signed Jobholder: _____ Date _____

Print Name Jobholder: _____ NI No: _____
WILLOW GROVE PRIMARY SCHOOL

School Name: _____

DFES _____

Person Specification Finance Officer

A. Experience

	Essential	Desirable	Source A = Application I = Interview R = References T = Task/Observation P = Presentation
Experience working with computer packages such as Microsoft Outlook, Excel, Word for work processing, spreadsheets, databases and researching information	E		A, I, T
Experience of record management, and maintaining Management Information Systems (MIS) and Financial Systems	E		A, I
Experience of using Arbor Finance and Arbor MIS		D	A, I
Experience of working in a fast-paced office environment.	E		A, I
Experience of working in a school office		D	A, I
Experience of undertaking a range of administration tasks	E		A, I, R
Experience of general financial procedures and financial reporting.	E		A, I, T
Experience of working in line with financial policies and procedures e.g. Scheme of Financial Administration (SOFA)		D	A, I
Experience of using communication with a variety of stakeholders e.g. parents, governors, external partners.	E		A, I, R, T
Previous experience of working with children of a relevant age		D	A, I

B. Training and Qualifications

	Essential	Desirable	Source
NVQ Level 3 qualification in Business Administration, Finance or Customer Service	E		A, I
At least 4 GCSE's in English, Maths, ICT or equivalent level of qualification	E		A, I
Training in school financial procedures, or willingness to complete training	E		A, I
Willingness to undertaking First Aid and Fire Warden training	E		A, I
Willingness to complete all other relevant training as required for this role	E		A, I

C. Knowledge and Understanding

Applicants should be able to demonstrate knowledge and understanding of the following areas relevant to the post.

	Essential	Desirable	Source
Knowledge of office procedures	E		A, I
Understanding of a range of general financial processes	E		A, I, T
Knowledge of school related office procedures		D	A, I
Knowledge of safeguarding procedures as outlined in Working Together to Safeguard Children and Keeping Children Safe in Education	E		A, I, T
Knowledge of working within a school setting or learning resource facility		D	A, I
Knowledge of SEMH (social, emotional and mental health) provisions and trauma-informed practice		D	A, I

D. Personal Skills, Abilities and Competencies

Applicants should be able to provide evidence that they have the necessary skills and abilities required.

	Essential	Desirable	Source
Ability to deliver polite, courteous and efficient customer service	E		A, I
Good communication skills to deal with adults and children	E		A, I
Ability to use initiative to respond to and resolve problems	E		A, I, R, T
Excellent organisational skills, attention to detail, high expectations of themselves and their professional standards	E		A, I, R, T
Ability to prioritise own tasks	E		A, I, T
Excellent interpersonal skills, ability to establish and maintain good working relationships with staff, pupils and parents	E		A, I
Ability to use different approaches to deal with pupils who may be dysregulated	E		A, I
Understanding of the importance of confidentiality and to be able to adhere to procedures	E		A, I
Supportive of the schools values and able to demonstrate working in line with the school's values of Be Safe, Be Kind, Be Positive	E		A, I

E. Legal Issues

	Essential	Desirable	Source
Legally entitled to work in the UK	E		A, I