

## JOB DESCRIPTION

<b>Job Title</b>	Finance Assistant - Education		
<b>Directorate</b>	Finance & Procurement		
<b>Reporting to</b>	Strategic Finance Business Partner - Education		
<b>Grade</b>	14		
<b>Evaluation ref:</b>	AG0046	<b>Job ref:</b>	<b>Family</b>
<b>Role purpose</b>			
<p>The Finance Assistant – Education supports the effective operation of the Finance &amp; Procurement Directorate by delivering high-quality transactional processing and accurate financial information. The role ensures that key activities such as resolving queries and maintaining financial records are completed efficiently and in line with the Council’s Financial Regulations. By acting as a reliable first point of contact for finance-related queries across the Education service, the postholder helps maintain strong communication channels and promotes consistent, compliant financial practice.</p> <p>In addition, the role contributes to robust budget monitoring and informed decision-making by providing timely financial information and analysis. Working closely with Business Partners and budget holders, the Finance Assistant utilises the Council’s financial management systems to support understanding, interrogation and use of financial data. The postholder also contributes to wider service improvement by assisting with ad-hoc projects and supporting colleagues across Finance, Education, and external partners such as schools and suppliers, ensuring a positive, accurate and customer-focused approach at all times.</p>			
<b>Accountabilities</b>			
<p>You will be responsible for supporting the Finance service with a variety of transaction processing and providing information to support budget monitoring, including:</p> <ul style="list-style-type: none"> <li>• Supporting with maintenance of financial records.</li> <li>• Acting as a point of contact for finance and the education service for queries on financial information.</li> <li>• Supporting budget holders to utilise our accounting systems.</li> <li>• Ensure Financial Regulations and procedures are adhered to and provide support where required.</li> <li>• Supporting Business Partners with provision of financial information by interrogation and analysis of the Council’s financial management information system on an ad-hoc basis.</li> <li>• Assist with ad hoc projects.</li> </ul>			

## JOB DESCRIPTION

Impact			
<b>Contacts &amp; Relationships</b>			
<p><b>Internal contacts:</b> All members of the Finance team, budget holders in Education, colleagues in ICT, Human Resources, Exchequer Services and Corporate Finance. The purpose of these contacts is to inform, advise, discuss, provide and receive information, to present recommendations on changes to procedures/systems or whilst taking appropriate action to deal with problems/queries.</p> <p><b>External contacts:</b> Contact will include suppliers, schools, and customers.</p> <p>The jobholder has no direct line management responsibilities.</p>			
	<b>Essential</b>	<b>Desirable</b>	
<b>Knowledge</b>			
Understanding of basic financial processes such as purchase orders, invoice handling and financial record keeping.	X		
Knowledge of financial management systems and their role in budget monitoring.	X		
Awareness of local authority financial regulations, controls and procedures.		X	
Understanding of Education funding processes such as High Needs provision.		X	
Awareness of procurement principles and supplier management.		X	
<b>Experience</b>			
Experience responding to financial queries from internal colleagues or external partners.	X		
Experience maintaining accurate financial records and working with financial systems.	X		
Experience supporting service improvement initiatives or ad-hoc project work.		X	
Experience working within a local authority or public sector organisation.		X	
<b>Qualifications / Registrations / Certifications</b>			
Good general standard of education (e.g., GCSEs or equivalent), particularly in English and Maths.	X		
AAT Level 2/3 or willingness to work towards it.		X	

## JOB DESCRIPTION

Training or certification in financial systems or purchase-to-pay processes.		X	
<b>Skills</b>			
Strong attention to detail and accuracy when maintaining financial records and working with financial systems.	X		
Good numeracy and IT skills, including confidence using financial or data systems.	X		
Effective communication skills, able to engage with a range of stakeholders..	X		
Problem-solving skills for resolving invoice and financial queries.			
Ability to organise and prioritise workload to meet deadlines.	X		
Ability to interpret and analyse financial data to support budget monitoring and decision-making.		X	
Customer-focused approach with the ability to build positive working relationships.		X	
Adaptability and willingness to support colleagues and take on varied tasks.		X	
<b>Working Conditions</b>			
Hybrid working			
<b>Working Arrangements</b>			
Somerset Council's dynamic Working Strategy will be applied to this position.			
<b>Corporate Responsibilities</b>			
Understand, uphold and promote the aims of the council's equality, diversity and inclusion policies; health, safety and wellbeing of self and others; and Organisational values in everything you do. Equality and Diversity practice covers both interaction with staff, service users and communities and includes challenging discrimination and promoting equality of opportunity for all.			

Date: July 2025