
JOB TITLE Office Manager/Bookkeeper

DATE 19th January 2024

REPORTS TO Managing Director

About U&I Educational Partners:

U&I Educational Partners has been operating since 2022, we are a small, but growing, business located in Gisborne. We are a multidisciplinary education service for children, young adults, families, schools and community groups. U&I Educational Partners' specialisation is in serving the neurodivergent community and those who seek to support them by providing services in individual therapy, holiday programs, advocacy & professional development. Through educational therapy, we support clients who have learning difficulties or a diagnosed disability including, but not limited to, ADHD, ASD, dyslexia, dyscalculia, intellectual disability sensory processing and emotional regulation. For further information visit: www.uandi.com.au.

About the Role:

This is a part-time role, ideally beginning with 25hrs per week. As the business is rapidly growing, the role will develop into a full-time position of 38hrs per week. U&I Educational Partners falls under the SCHADS Award – Social and Community Employees. This role is set at Level 3 or higher to be determined at time of employment based on experience and relevant qualifications. For further information regarding the SCHADS Award classifications visit: Fairwork Australia SCHADS Award.

POSITION DESCRIPTION

Position The Office Manager/HR/Bookkeeper coordinates the administration of U&I Educational Partners and will provide high quality and efficient administrative, human resources and financial support to the Managing Director and other directors as required. The position is responsible for front office reception and as the first point of contact for the organisation, it is vital to greet our clients and visitors in a welcoming and neurodivergent-friendly manner.

The successful applicant will have well-developed organisational, financial, human resources and administrative support skills, including a high level of attention to detail. They will be highly organised and self-motivated and have the ability to successfully liaise with staff of all levels and deal sensitively with clients and stakeholders.

- Responsibilities**
- Answering phone calls, meet and greet of clients and maintaining and updating shared calendar of appointments.
 - General reception and administration duties including but not limited to, processing correspondence, filing, photocopying, database management, processing of fees, general, banking and mail duties.
 - Client account management including data entry.
 - Daily use of Microsoft Word, Outlook, Excel and QuickBooks.
 - Managing the Reception and Accounts emails.
 - Weekly client invoicing.
 - Accounts Receivable and Payable.
 - Accurate Bank reconciliations and manage banking duties as required.
 - Manage payroll on a weekly basis and maintain accurate employee records.
 - Follow up outstanding debtors, maintain records and provide reports as required.
 - Ensure all financial records are accurate and timely for EOFY.
 - Preparation and Lodgement of BAS and PAYG.
 - Preparation and Lodgement of Superannuation Monthly Return.
 - Liaise with our Accountant for annual accounts Financial Statements and tax returns.
 - Provide administrative and organisational assistance to the Managing Director as required.

The above list is not exhaustive, and the role may change to meet the overall objectives of the company.

- Other Duties**
- Job specific filing, emailing and preparation of correspondence.
 - Provide all necessary office support to educational therapists.
 - Attend meetings when requested.
 - Prepare clear, professional reports for presentation & discussion at meetings, when requested.
 - Willingness to administratively support a rapidly growing small business.
- Required qualities**
- Unwavering belief and commitment to supporting the neurodivergent community.
 - Professional approach.
 - Ability to work under pressure.
 - Organisational and time management skills.
 - Excellent attention to detail.
- Desired competencies**
- Business awareness
 - Strategic thinking

PERSON SPECIFICATION

- Qualifications**
- Certificate IV Accounting & Bookkeeping is desirable.
- Experience**
- Ideally, minimum three years in similar role, with a particular emphasis on payroll, BAS, PAYG, accounts receivable and bank reconciliations.
- Knowledge**
- Proficient knowledge of QuickBooks with ability to transition the company to Xero.
 - Personal or professional knowledge of the NDIS, including the pricing guidelines is desirable.
 - Familiarity with Apple operating systems and products.
 - Familiarity with Google Workspace and Google Drive.
- Skills & competencies**
- **Customer service focused:** committed to providing exceptional customer service across all channels – written, phone and face to face.
 - **Communication:** the ability to communicate clearly and concisely, varying communication style depending upon the audience. Able to follow instructions & ask questions when uncertain of information or process.
 - **Attention to detail:** excellent attention to detail and written skills when communicating with others, both internally and externally.
 - **Teamwork:** willingness to assist and support others as required and get on with team members
 - **Time management/organisation:** accomplish objectives effectively within time frame given, carry out administrative duties within portfolio in an efficient and timely manner. Able to set own work priorities & use initiative.
- Personal attributes**
- Unwavering belief and commitment to supporting the neurodivergent community.
 - Professional approach when dealing with clients in person and on the telephone.
 - Use discretion and maintain confidentiality.
 - Confident manner.
 - Positive approach to change.
- Other**
- Valid driver's licence is essential.
 - Valid employee working with children check (or proof of submitted application) is required prior to commencing employment.

This job description serves to illustrate the scope and responsibilities of the post and is not intended to be an exhaustive list of duties. You will be expected to perform other job related tasks requested by management and as necessitated by the development of this role and the development of the business.