**Trinity St Mary’s CE School**

**School Business Manager (SBM)**

**Job Description**

The School Business Manager (SBM) works as part of the Senior Leadership Team (SLT) to provide strategic vision and leadership so that Trinity St Mary’s CE Primary School (TSM) can deliver its aims and priorities, ensuring services are delivered effectively, efficiently and in line with probity and the school’s governance requirements.

The SBM will work in partnership with the Headteacher to:

* Provide vision and strategic leadership for the school, particularly with respect to financial, school site and human resources management
* Create, maintain and develop conditions which enable effective learning;
* Ensure that the aims of the school are implemented in accordance with the policies of the

Governing body;

* Be responsible for the management of Financial Resources, Human Resources, Site management and premises including Health and Safety, Administration Information and ICT
* Promote the health, well-being and safety of the school’s community;
* Extend the school’s links with our local community;

**Leadership & Strategy**

* + - * Negotiate and influence strategic decision making within the Senior Leadership Team;
      * Have overall responsibility for the creation and implementation of key policies related to the role of the School Business Manager;
      * Plan and manage change in accordance with the school’s development/strategic plan;
      * Ensure Trinity St Mary’s CE Primary School makes the best possible use of resources through effective planning, considering all financial and other resource implications;
      * Ensure a creative approach to income generation and marketing the school
      * Attend Senior Leadership Team and Governing Body Finance and Premises Committees;
      * Produce timely and fully costed proposals, ensuring they are sustainable through long-term financial plans;
      * Ensure an effective link between the school budget plan and the school strategic plan – necessary to achieving the School Financial Value Standard (SFVS) and sustainable school improvement;
      * Understand the implications of government policies and educational trends and developments;
      * Plan for and implement new initiatives;
      * Provide strategic support to the Headteacher and governing body on all aspects of School Business Management;
      * Line management including performance management of the disciplines of finance, human resources, admin ICT, premises management, administration and marketing as required

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* + - * Undertake the day-to-day management, communication, induction, training and deployment of the administration (including ICT) and extended services within a professional and supportive environment, to ensure that targets and objectives are met;
      * Devolve responsibilities and delegate tasks as appropriate, monitoring outcomes;
      * Develop effective links with the community, including business and industry, to extend the curriculum and enhance teaching and learning;
      * Ensure effective risk management, for example, in health and safety and in the management of any third-party service contracts;
      * Ensure effective management of the letting of Trinity St Mary’s CE Primary School’s premises to outside organisations to enhance income generation
      * Negotiate, manage and monitor contracts, tenders and agreements ensuring ‘best value’ at all times;
      * Manage all aspects of school business management in a sustainable and eco-friendly manner;
* Raise the school’s profile within the school community by leading on the publicity materials/resources such as the website, prospectus, open days, signage, etc.
* Sustain the vision and values of Trinity St Mary’s CE Primary School

**Financial Resource Management**

* Evaluate information and consult with the Head Teacher and Governors to prepare realistic and balanced budgets
* Submit proposed budgets to the Head Teacher and Governors in a timely manner for approval and assist the overall financial planning process;
* Discuss, negotiate and agree the final budgets for the school and extended services;
* Use the agreed budget to actively monitor and control performance to achieve value for money;
* Identify and inform the Head Teacher and Governors of the causes of significant variance and take prompt corrective action;
* Propose revisions to the budget if necessary, in response to significant or unforeseen developments;
* Provide ongoing budgetary information to relevant people;
* Advise the Head Teacher and Governors if fraudulent activities are suspected or uncovered;
* Maintain a strategic financial plan that will indicate the trends and requirements of the development plan and will forecast future year budgets;
* Identify additional finance required to fund proposed activities;
* Seek and make use of specialist financial expertise;
* Maximise income through lettings and other activities ;
* Select types of investments which are appropriate for the school, taking account of risks, views of stakeholders and identify possible and suitable providers in order to maximise return;
* Present timely and fully costed proposals, recommendations or bids;
* Put formal finance agreements in place with suitable providers for agreed amounts, at agreed times and appropriate agreed costs and repayment;
* Develop a long-term business plan for the future development of Trinity St Mary’s CE Primary School
* Lead on the implementation of audit recommendations;
* Ensure that Trinity St Mary’s CE Primary School complies with the SFVS;
* Use financial management information, especially benchmarking tools, to analyse trends and identify opportunities for greater efficiency;
* Provide Financial Monitoring Reports for the governors and staff according to an agreed schedule, reporting immediately any exceptional problems;
* Prepare all financial returns for the DfE, LA and other central and local government agencies within statutory deadlines;
* Ensure best value principles are adopted and that financial resources are being used effectively and efficiently;
* Manage the accounting function effectively to agreed procedures, and maintain those procedures by conducting at least an annual review, adhering to Local Authority procedures;
* Authorise, within agreed limits, purchase orders and invoices;
* Oversee efficient and safe routines concerning the collection, security and banking of cash;
* Undertake regular reconciliation of various accounts and grants;
* Provide support and advice for fund-raising activities;
* Arrange and supervise service level agreements and contracts with external suppliers;
* Implement the approved insurances, and handle any claims that arise.

**Administration Management**

* Manage the whole administrative function and lead on the process;
* Design and maintain administrative systems that deliver outcomes based on the school’s aims and goals;
* Manage systems and link processes that interact across the organisation to form complete systems;
* Define responsibilities, information and support for staff and other stakeholders;
* Develop process measures that are affordable and that will enable value for money decisions for those managing resources;
* Establish and use effective methods to review and improve administrative systems;
* Use data analysis, evaluation and reporting systems to maximum effect by ensuring systems are streamlined to maximise efficiency and avoid duplication;
* Benchmark systems and information to assess trends and make appropriate recommendations;
* Supervise the use of the administrative databases and the preparation and presentation of data required by various staff and agencies;
* Maintain and update the administrative and financial software used by Trinity St Mary’s CE Primary School;
* Promote the effective use of administrative systems;
* Act as correspondent for the DfE and be responsible for the records and returns required;
* Ensure compliance with the Data Protection Act/GDPR;
* Prepare information for publications and returns for the DfE/LA and other agencies and stakeholders within the statutory guidelines.

**Management Information Systems & ICT**

* Communicate the strategy and relevant policies, including Data Protection for use of technology across the organisation;
* Ensure data collection systems providing information to stakeholders are streamlined to maximise efficiency of the data supplied.
* Ensure contingency plans are in place in the case of technology failure;

**Human Resource Management**

* Manage the payroll services for all staff including the management of pension schemes and associated services;
* Ensure the school’s equality policy is clearly communicated to all staff in the organisation;
* Ensure that all recruitment, appraisal, staff development, grievance, disciplinary and redundancy policies and procedures comply with legal and regulatory requirements;
* Manage recruitment, performance management, appraisal and development for administrative staff;
* Monitor the relevant legal, regulatory, ethical and social requirements and the effect they have on the organisation and staff;
* Ensure people have a clear understanding of the policies and procedures and the importance of putting them into practice;
* Monitor the way policies and procedures are actioned and provide support where necessary;
* Seek and make use of specialist expertise in relation to HR issues;
* Evaluate the school’s strategic objectives and obtain information for workforce planning;
* Identify the types of skills, knowledge, understanding and experience required to undertake existing and future planned activities;
* Manage the procedural arrangements around the appointment and resignation of staff, including participation in the short listing and interview of applicants for the premises, extended services and administration teams;
* Be responsible for staff employment contracts;
* Provide high quality advice on employment issues, service conditions and employment contracts;
* Review the terms and conditions of service for all staff in response to changes notified by the Local Authority, ensuring that staff are informed of changes which will affect them;
* Maintain the personnel database, ensuring compliance with the Data Protection Act requirements;
* Ensure safeguarding procedures are followed for staff, volunteers and external agencies;
* Maintain the Single Central Record.

**Facility & Property Management**

The School Business Manager will line manage the Admin Assistant/Attendance Officer and will be responsible for monitoring their work, ensuring that they are carrying out their role effectively as outlined in their job description.

The SBM will seek professional advice on insurance and advise the Head Teacher on appropriate insurances for the organisation and implement and manage such schemes accordingly.

**Health & Safety**

**Will work in conjunction with the Site Manager to:**

* Act as the Health & Safety Co-ordinator and Fire Officer;
* Oversee the planning, instigation and maintaining of records of fire practices and alarm tests;
* Ensure the written health & safety policy statement is clearly communicated to all staff;
* Ensure the health & safety policy is implemented at all times, put into practice and is subject to review and assessment at regular intervals or as situations change;
* Enable regular consultation with others on health and safety issues;
* Ensure systems are in place to enable the identification of hazards and risk assessments;
* Ensure systems are in place for effective monitoring, measuring and reporting of health and safety issues to the Senior Team, Governors and where appropriate the Health & Safety Executive;
* Ensure the maximum level of security consistent with the ethos of the organisation;
* Oversee statutory obligations and ensure these are being met for pupils with Special Educational Needs and Disability (SEND).

**Safeguarding**

The post holder will share the school’s commitment to safeguarding, and promote the welfare of, the children in our care:

* To be fully aware of and understand the duties and responsibilities arising from the Children’s Act 2004 and Working Together in relation to child protection and safeguarding children and young people as this applies to the worker’s role within the organisation.
* To also be fully aware of the principles of safeguarding as they apply to vulnerable adults in relation to the worker’s role.
* To ensure that line managers are made aware and kept fully informed of any concerns which staff members may have in relation to safeguarding and/or child protection.

**Accountable to:** The Headteacher, the Governing Body, Southwark Diocesan Board of Education

Trinity St Mary’s CE Primary School is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share its commitment. Appointment to this post will be subject to an enhanced DBS check.

Sympathy with the ethos of a Church of England school is essential to this post

**Job Specification for School Business Manager at Trinity St Mary’s CE Primary School**

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| **Business Manager Selection Criteria** | |  |
| **Qualifications** | **Essential or Desirable** | **Evidence** |
| Educated to at least A level with GCSE (or equivalent) in Maths and English | E | Application form |
| Proven experience in relevant financial management in an organisation | E | Certificates |
| Relevant work in a similar context e.g. education social care, or industry | E | References |
| Qualification in business management/ school business management e.g. CSBM, DSBM, or equivalent or (working towards) | D |  |
| Experience of working in a leadership team and influencing at a strategic level | D | Application form |
| Experience of working as a bursar or SBM in a school | D |  |
| Safeguarding training | D |  |
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| **Leadership and Management** |  |  |
| Evidence of problem analysis and the ability to summarise findings | E | Application form /  Reference /  Interview |
| Independently able to propose solution to problems within an overall strategic plan | E |
| Experience of leading and managing others including their professional development and performance management | E |
| Evidence of the ability to devolve responsibilities and delegate tasks and monitor outcomes | E |
| Good organisation and proven administrative abilities | E |
| Flexibility | E |
| Ability to initiate, plan, implement and deliver change | D |
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| **Knowledge and Experience** |  |  |
| Experience of leadership of a team of staff ideally including those not directly supervised throughout the day | E | Application form |
| Knowledge and understanding of how to interpret numerical/ statistical data | E |  |
| Knowledge and understanding of relevant legislation (e.g. employment, health and safety, equal opportunities) | E | Application form |
| Fluency in the use of IT based management information systems (FMS, SIMS.net, Excel, and Microsoft systems) | E |  |
| Knowledge and understanding of property management | D |  |
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| **Skills** |  |  |
| Has well developed interpersonal skills working with individuals and a team | E | Application form /  Presentation / task  interview |
| Able to negotiate consult and make effective decisions | E |
| Has excellent organisation, planning and analytical skills | E |
| Able to demonstrate a high level of communication skills orally and in writing | E |
| Able to devolve responsibilities, delegate tasks and monitor outcomes | E |
| Experience of organising meetings, minuting and follow up | E |
| Experience of providing PA/administrative support at a senior level | D |
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| **Personal Qualities** |  |  |
| A desire to make a difference to the lives of children | E | Application form |
| Resilience, energy, enthusiasm and creativity | E | References and interview |
| Able to work as part of a team (to include staff governors, parents, other schools with the locality SDBE and Local Authority) | E |  |
| Able to work under pressure, meet deadlines, work flexibly and calmly and be able to reflect on processes and outcomes | E |  |
| Supportive of the ethos of the school | E |  |
| Approachable, courteous and able to present a positive image of the school to parents, callers and visitors | E |  |
| Able to relate well to children | E |  |