

### **Job Description**

As part of the Senior Leadership Team, to be responsible for the operational management of finance, HR, Premises, Administration and Resource Management including community usage and lettings.

To 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 ethos and aims of the school, including the health, well-being and safety of the school's community;
- Establish a good working relationship with all stakeholders;
- Extend the school's links with our local community, including business and industry;

### **Leadership & Strategy**

- Be responsible for strategic planning aspects over current year and a three year period where financial implications occur in order for the school to make the best possible use of resources available and to keep abreast and advise on current government and LA financial policy;
- Work within the leadership team to ensure that the revenue and capital funding, equipment and resources are managed efficiently and cost-effectively in support of educational and organisational objectives;
- Identify, explore and secure external funding for the school whilst reporting to the Headteacher and Governors, attending leadership team and governing body meetings where appropriate;
- 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. These policies will include, but are not limited to Lettings and Charges, Scheme of Delegation, School Governance, Risk Management, Safeguarding, Pay and Health and Safety.
- To ensure that a suitable Business Management Plan is in place which has an effective link with 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
- Be responsible for the overall line management and professional development of the administration staff and the premises staff in developing and implementing procedures, protocols and office systems to meet the changing needs of the school. To set objectives and manage performance of administration and premises staff;
- To liaise with the Governing body and their clerk as required.
- To be accountable for preparing the school for Local Authority audits, report on outcomes to Governors and create action plans where necessary;
- Ensure Beatrix Potter School makes the best possible use of resources through effective planning, considering all financial and other resource implications in a sustainable and eco-friendly manner;
- Ensure and manage effective management of the letting of Beatrix Potter Schools' premises to outside organisations, including extended school activities to enhance income generation;
- Ensure that all relevant insurances are in place, reviewed and renewed when necessary;
- 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 Beatrix Potter School;

**Admissions:**

- Monitor the administration of admissions (as the admissions authority) for the nursery and main school (reception to Year 6) working with the local authority;
- Monitor the way in which in-year admissions are conducted in a timely way to minimise the number of vacant places on the school role, including contacting other schools when referral are made and contacting prospective parents;
- Informing the LA of vacancies when they arise and sending monthly vacancy pro-forma's to Pupil Services;

**Financial Resource Management**

- Negotiate, manage and monitor contracts, tenders and agreements ensuring 'best value' at all times;
- To formulate short (one year) and long term (three year) budget strategies with agreed procedures which are reviewed annually and to prepare and present the annual budget for approval by the Headteacher and Governors with regular financial updates and reports over the year;
- Maintain a strategic financial plan that will indicate the trends and requirements of the development plan and will forecast future year budgets;
- To be responsible for all the financial accounts within the school, ensuring that all finance procedures are carried out in line with current regulations, preparing financial returns (DFE, LA and other bodies as required) and operating all bank accounts, including ParentPay, for public funds, school journeys and any external grants and to undertake weekly/monthly/termly/annual reconciliations as required;
- Oversee efficient and safe routines concerning the collection, security and banking of cash;
- Authorise, within agreed limits, purchase orders and invoices;
- To prepare the school's end of year financial statement;
- To ensure effective monitoring systems of income and expenditure are operated. Identify and report to the Head and Governors where significant variances occur;
- To undertake accounting for the school, recommending appropriate action where necessary, obtaining comparative quotes, where appropriate, in order to receive best value for money. Having responsibility for ensuring the banking of monies, payment of invoices, chasing monies owed to the school and payment of casual staff and overtime;
- Maximise income through lettings and other activities;
- To review annually Service Level Agreements offered by the LA and consultants to achieve best value for money and review the school's insurance processing claims where loss or damage occurs;
- Develop a long-term business plan for the future development of Beatrix Potter School;
- To prepare bids for capital development projects, external funding possibilities and other grants and make recommendations based on these bids to the Headteacher and Governing body;
- To ensure that Beatrix Potter complies with the SFVS (School's Financial Value Standard), reporting annually to the relevant bodies;
- Use financial management information, especially benchmarking tools, to analyse trends and identify opportunities for greater efficiency;
- Lead on the implementation of audit recommendations;
- To be a member of the Finance and Premises Committee and full Governing body meetings as required – these are often outside normal working hours;

**Administration Management**

- Manage the whole administrative function and lead on the process;
- Develop, design and monitor and update management information systems that deliver outcomes based on the school's aims and goals;
- Establish and use effective methods to review and improve administrative systems;
- Ensure that the pupil database and other pupil records are properly maintained and regularly updated by monitoring the admin officer responsible for that role; Provide reports and analysis of data as required;

- Benchmark systems and information to assess trends and make appropriate recommendations;
- Act as correspondent for the DfE and LA 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 and ICT**

- Communicate the strategy and relevant policies, including Data Protection for the use of technology across the organisation;
- Ensure contingency plans are in place in the case of technology failure;
- Develop and manage an effective asset management plan to optimise learning outcomes across the school;
- Work with the Headteacher to develop a sustainable, cost-effective ICT plan that supports both educational and operational objectives;

**Human Resources Management**

- Be responsible for ensuring effective procedures are in place to meet the LA’s regulations in relation to all personnel matters relating to staff;
- Provide a confidential, effective and efficient personnel service to all staff in line with the school’s adopted policies and procedures;
- Be responsible for the administration of all personnel matters including recruitment, retention, resignation, contracts of employment, absence returns and payroll for all staff and ensure policies and procedures comply with legal and regulatory requirements;
- Manage recruitment, performance management, appraisal and development for administrative staff;
- Line management of teaching support staff for all HR areas;
- Ensure people have a clear understanding of the policies and procedures and the importance of putting them into practice;
- Seek and make use of specialist expertise in relation to HR issues;
- Be responsible for staff employment contracts and personnel files ensuring they are kept in good order;
- Review the terms and conditions of service for all staff in response to changes notified by the LA, ensuring that staff are informed of changes which will affect them;
- To monitor the provision of induction for newly appointed staff and provide advice and guidance to existing staff on issues relating to their employment, including providing ID badges and entry fobs where required;
- Liaise with ‘bought in’ services e.g. Occupational Health, Payroll and HR Advisers;
- Record and maintain sickness records and ensure that all personnel returns, including Absence returns, are made in a timely fashion;
- Maintain the personnel database, ensuring compliance with Data Protection Act requirements;
- Ensure safeguarding procedures are followed by staff, volunteers and external agencies;
- Maintain the Single Central Record;

**Facility and Property Management**

The School Business Manager will line manage the Administrative Staff and Premises Manager and will be responsible for monitoring their work, ensuring they are carrying out their role effectively as outlined in their job description.

The SBM will lead to:

- Develop a Business Continuity and Disaster Recovery strategy to include a detailed plan;
- To be the lead in the management and maintenance of the school site (including planned works) and to ensure that contracts for annual checks are carried out as well as ensuring all insurance and liability insurance policies are up to date;
- To ensure that the security of the site is maintained at all times and to make recommendations for improvement as necessary and is compliant with Safeguarding policies;
- Oversee the facilities and estate functions of Beatrix Potter School to ensure:
  - 1) An asset management plan is developed, implemented and updated in line with agreed priorities including risk management;
  - 2) All sites, buildings and facilities are compliant with relevant legislation and procedures such as health & safety and child protection;
  - 3) Catering, cleaning, grounds maintenance and building maintenance programmes are fulfilled to the agreed quality standards by staff and contractors;
  - 4) Catering is managed to agreed delivery criteria and within agreed budgets;
  - 5) Policies and procedures for contractor and supplier access to site and their management on site is aligned to children safeguarding policies;
- Under guidance establish and maintain a school Health & Safety policy and oversee a programme of risk assessments and fire drills;
- To maintain a lettings policy for the school and identify avenues for letting premises and increasing income and to develop ways in which the school can be accessed for community use;
- Commission, procure and manage external services required for the facilities and estate management function;
- To undertake other related duties that may be required to meet the needs of Beatrix Potter School;
- Obtain tenders, obtaining planning permission and liaising with building contractors and architects where relevant;

**Health & Safety**

The SBM will work in conjunction with the Premises Manager to:

- Act as the Health & Safety Coordinator 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 and 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 to write and maintain risk assessments;
- Ensure systems are in place for effective monitoring, measuring and reporting of health and safety issues to the Senior Leadership Team, Governors and where appropriate the Health and 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);

**Contract Management and Procurement**

- To be responsible for and manage contracts with external providers which will include, but are not limited to:
  - 1) Site Services and Cleaning

- 2) Photocopying and Printing
- 3) Catering Services
- 4) Site Maintenance and Health and Safety

- To lead in dispute resolution and rectification where contractor performance is not meeting standards;
- To identify, research and recommend contractors to the Governing body;
- To ensure that the school adheres to the WBC procurement guidelines and that major procurement is communicated to the leadership team and governors;

**Marketing**

- Ensure an effective marketing and communications strategy for the whole school;
- Maximise income generation within the ethos of the school and ensure value for money principals are adopted, for example, in extended schools’ activities
- Secure funds to which the school is entitled; act as a point of contact with central and other agencies about grant applications, gifts and other donations;
- Secure bid-based competitive funds by effective use of bidding systems and contacts;
- Prepare bids and generate new income streams and grant funding;
- Liaise with the PTA and local businesses for fundraising, arranging vocational experience and joint projects;
- Promote the school to different audiences and raise the profile within the local community;
- Lead, develop and regularly review a clear and consistent brand, including guidelines;

**Safeguarding**

The SBM 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 and the Governing Body.

This job description is not an exhaustive or final statement of duties. The post holder will be expected to take on duties and responsibilities commensurate with the grade of the post as directed by the Headteacher.

Beatrix Potter 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.

Person Specification

Business Manager Selection Criteria		
Qualifications	Essential or Desirable	Evidence
NVQ4 or recognised Degree or equivalent in relevant discipline	E	Certificates
Educated to at least A level with GCSE (or equivalent) in Maths and English	E	Certificates
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	
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	
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	
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	
<b>Personal Qualities</b>		
A desire to make a difference to the lives of children	E	Application form
Resilience, energy, enthusiasm, creativity and a sense of humour	E	References and interview
Able to work as part of a team (to include staff governors, parents, other schools within the 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	
<b>Other Job Requirements</b>		
Enhanced DBS Check	E	
A commitment to safeguarding	E	
Knowledge and understanding of child protection and safeguarding	E	