



## **Edison Primary School**

### **JOB DESCRIPTION : Academy Trust Business Lead**

At Edison, we are committed to creating a diverse workforce. We will consider all qualified applicants for employment without regard to sex, race, religion, belief, sexual orientation, gender reassignment, pregnancy, maternity, age, disability, marriage or civil partnership.

**Salary: P08 SCP 46- Edison Pay Scale**

**Hours: 8:30am- 4:30pm, 5 days a week**

**Contract type: Full time and permanent**

**Contracted Weeks: 41 weeks (37 pupil weeks including 5 INSET days and 15 admin days)**

**Reporting to: Headteacher**

**Responsible for: Edison Primary School admin and site team**

#### **Main purpose**

The Academy Trust Business Lead will be responsible for managing the strategy and operation of the business functions of our school, including financial management, health and safety, human resources, compliance and administration.

They will advise on and implement the day-to-day support that enables the school to operate effectively and efficiently, and that allows other members of the leadership team to focus on teaching and learning.

The Academy Trust Business Lead will be the named Chief Financial Officer for Edison Trust Limited.

#### **Duties and responsibilities**

##### **Leadership and strategy**

- Have oversight and be responsible for line-managing premises, finance and administrative support staff, including carrying out long-term resource planning and overseeing recruitment, appraisal and professional development (human resources)
- Take a lead role in all internal and external audits for Edison Trust Limited
- Under the direction of the headteacher, lead on all financial matters in school, to ensure the school's successful financial performance and to ensure financial decisions are clearly linked to the school's strategic goals
- Implement school-wide changes and allocate resources in line with the school improvement plan, putting policies and procedures in place and communicating them to staff
- Take all decisions in line with the vision and values of the school, and encourage others to do the same
- As part of the senior leadership team, implement a marketing plan for the school, which utilises the school website, signage, the prospectus, and communications with current and prospective parents and external agencies
- Working with the headteacher, monitor developments in technology, considering how it can be used to enhance the school's business processes, teaching and learning, and staff wellbeing
- Develop and oversee an asset management plan



- As a member of the senior leadership team, attend all relevant leadership team meetings and report to trustees where appropriate

### **Financial management and fundraising**

- In partnership with the headteacher, manage the school's budget and ensure it is balanced, realistic, and represents an effective use of public funds
- Submit the budget to the board of trustees
- Monitor the budget all year round, advising the headteacher where revisions or changes are needed
- Forecast future years' budgets, based on the school's estimated funding and trends in expenditure, to enable the headteacher to make strategic, long-term decisions
- Produce monthly management accounts
- Comply with financial reporting requirements and submit statutory returns
- Report on the schools' financial position to the Board of Trustees in collaboration with the headteacher
- To negotiate, manage and monitor business contracts with external providers and service level agreements, ensuring full financial compliance
- Improve efficiency and streamline financial functions within the school's system (SAGE)
- Oversee school bank accounts on a day-to-day basis, ensuring money is banked, invoices are paid promptly, money owed is collected, and clear records are kept
- Working with the headteacher and Edison Friends, choose fundraising priorities in line with school development plan
- Working with the headteacher, develop and implement an income generation strategy in line with the school development plan and advise on financial risk management
- Find and apply for grants
- Lead on procurement processes, managing tenders where appropriate, conducting due diligence, benchmarking and evaluating suppliers, negotiating deals and ensuring value for money
- Oversee and manage the school's lettings offer
- Undertake tender preparation, specification, evaluation and monitoring in line with the school's scheme of delegation
- Ensure the effective and efficient operation of finance, delegating tasks to the finance assistant where appropriate
- Responsible for seeking professional advice on insurance and advising the Board of Trustees on the appropriate insurances for the school ensuring that appropriate cover is in place and reviewing and monitoring arrangements. Implementing the approved insurances and handling any claims that arise.
- Prepare appraisals for projects, and to assist them in the development of a business plan (long term financial strategy) for future developments of the school.
- Working with the headteacher, be responsible for the arrangements of the school catering facilities.
- Oversee the management of the school's financial position at an operational level and advise at a strategic level including:
  - a. Management of cash balances and monthly cash flow
  - b. Management of VAT claims to HMRC
  - c. Arranging appropriate dispensations such as PAYE & taxable benefits
  - d. Identification of opportunities for improving value for money



## **Human resources**

- Manage the school's payroll provision with the payroll provider
- Ensure that recruitment, appraisal, disciplinary and grievance policies are administered in accordance with employment law
- Working with the HR manager, ensure that all safer recruitment procedures are followed
- Liaise with the external HR provider on issues where appropriate and in collaboration with the headteacher
- Conduct reviews of the school's staffing structure to ensure effective deployment of staff and financial efficiency in collaboration with the headteacher
- Working with the HR manager and headteacher, oversee all staff contracts and action any authorised changes as required, ensuring that appropriate HR and payroll procedures are correctly carried out

## **Health and safety**

- With the headteacher and premises team, supervise the maintenance of the school site
- line manage and delegate key operational functions relating to site management to the Site Manager
- Manage the school's compliance with health and safety regulations, and put in place processes, procedures and completion of risk assessments to ensure the safety of all in the school
- Organise health and safety training for staff
- Advise the Site Manager on maximization of income from lettings and community activities.
- Oversee the provision and monitoring of buildings maintenance services through consultation with the Site Manager.
- Negotiate and instruct consultants, surveyors, architects and building contractors in conjunction with the Headteacher
- Project manage complex building projects and advise on Asset Management planning.

## **Compliance**

- Manage the school's compliance with statutory obligations, and advise others on the relevant legal, regulatory and ethical requirements
- Track all school policies and ensure they are updated in accordance with the policy review schedule
- Monitor and update the risk register

## **Administration**

- Keep records in accordance with the school's record retention schedule and data protection law, always ensuring information security and confidentiality
- Provide administrative support for the headteacher and trustees
- Support the data protection officer with ensuring data protection compliance and helping the school community understand how to comply with data protection law



## General Responsibilities

- Always maintain confidentiality and professional conduct as per the school code of conduct
- Carry out any other duties commensurate with post and responsibilities as reasonably directed by the Head Teacher.
- Alongside the Headteacher and senior team, be visible and present at the beginning and end of the school day to ensure the highest levels of pupil safety

The school business lead will be required to safeguard and promote the welfare of children and young people and follow school policies and the staff code of conduct.

Please note that this list of duties is illustrative of the general nature and level of responsibility of the role. It is not a comprehensive list of all tasks that the school business manager will carry out. The postholder may be required to do other duties appropriate to the level of the role, as directed by the headteacher.

## Person specification

CRITERIA	QUALITIES
<b>Qualifications and training</b>	<ul style="list-style-type: none"> <li>• A degree</li> <li>• A business or accountancy qualification from a professional body such as the ICAEW, ACCA, CIMA or CIPFA</li> <li>• A school business management qualification</li> <li>• Hold membership of a relevant professional body</li> </ul>
<b>Experience</b>	<ul style="list-style-type: none"> <li>• Successful leadership and management experience in a school, or in a relevant field outside education</li> <li>• Involvement in school self-evaluation and improvement planning</li> <li>• Line management experience</li> <li>• Contributing to staff development</li> <li>• Working with children or young people</li> <li>• Working with auditors for external and internal reviews of systems and processes</li> </ul>
<b>Skills and knowledge</b>	<ul style="list-style-type: none"> <li>• Expert knowledge of financial management</li> <li>• Excellent attention to detail</li> <li>• Previous use of SAGE, Dataplan or other payroll provider</li> <li>• Expert knowledge of pensions (support staff and teacher)</li> <li>• Effective communication and interpersonal skills</li> <li>• Ability to communicate a vision and inspire others</li> <li>• Ability to build effective working relationships with staff and other stakeholders</li> <li>• Strong understanding of data protection and confidentiality, including knowledge of dealing with subject access requests or freedom of information requests</li> </ul>
<b>Personal qualities</b>	<ul style="list-style-type: none"> <li>• Commitment to promoting the ethos and values of the school and getting the best outcomes for all pupils</li> <li>• Commitment to acting with integrity, honesty, loyalty and fairness to safeguard the assets, financial probity and reputation of the school</li> <li>• Ability to work under pressure and prioritise effectively</li> <li>• Commitment to maintaining confidentiality at all times</li> <li>• Commitment to safeguarding and equality</li> <li>• Embraces change well</li> <li>• Deals with difficult situations effectively</li> </ul>