

## JOB DESCRIPTION

<b>Position Title</b>	<b>School Business Manager (Advanced) updated</b>		
<b>Location</b>	United Schools Federation		
<b>Reporting to</b>	Executive Head		
<b>Position Number(s)</b>			
<b>Grade</b>	H		
<b>Directorate/Section/School</b>			
<b>Effective date of JD</b>		<b>JE Job Number</b>	G.0674

### **Job Purpose:**

The main purpose of the job is to be responsible to report to the Executive Head for strategic planning aspects including all financial implications and ensuring that the Federation makes the best possible use of resources available.

This role requires the ability to fulfil all spoken aspects of the role with confidence and fluency in English.

### **Main duties and responsibilities:**

- Responsible for the Finance, Personnel Management, Administration, Training and Development of support staff, and all matters within the management of the school which are supportive to, but do not involve, the teaching function.
- Advise the Executive Head and Governors on financial policy, preparing appraisals for particular projects and for the development of a business plan (long term financial strategy) for the future development of the Federation.
- Prepare the annual estimates of income and expenditure for approval by Executive Head and Governors; obtain agreement of budgets, monitor accounts against budgets; prepare regular management accounts for budget holders and report on the financial state of the Federation to Executive Head and Governors.
- Use financial management information, especially benchmarking tools, to identify areas of relative spend, assess trends and directly advise the Leadership Group accordingly.
- Be responsible for the management of the Federation accounting function, ensuring its efficient operation according to agreed procedures, and maintain those procedures by conducting at least an annual review; undertake a reconciliation of the Federation's accounting system with the LEA's financial information at least once a month.
- Monitor all accounting procedures and resolve any problems, including the ordering, processing and payment for all goods and services provided to the Federation; the operation of all bank accounts, ensuring that a full reconciliation is undertaken at least once per month; maintenance of the assets register and

preparation of invoices and collection of fees and other monies due, instructing legal action where necessary to recover bad debts.

- Prepare final accounts and work with auditors and the LEA, provide detailed management accounts for the Federation according to an agreed schedule, reporting immediately any exceptional problems, prepare all financial returns for the DfES, LEA and other central and local government agencies within statutory deadlines.
- Responsible for ensuring the provision of a comprehensive payroll service for all Federation staff and be responsible for effective and efficient communication with the payroll service provider.
- Maximise income generation within the ethos of the Federation.
- Be the point of contact with central and other agencies regarding grant applications, gifts and other donations.
- Negotiate, manage and monitor contracts, tenders and agreements for the provision of support services.
- Responsible for overseeing general personnel matters, overseeing the work of the Federations Senior Personnel Administrator in areas such as administration for new teacher recruitment; clearance of new staff and issue of contracts of employment; provision of advice to the Principal, Senior Managers and Governors on employment issues; provision of advice to Governors on assessment of salaries, expenses, sickness and maternity procedures, redundancy and other matters of dismissal, competency and disciplinary issues; maintenance of confidential personnel records.
- Provide leadership and guidance for support staff, including direct line management responsibility where appropriate: administrative, clerical, and financial.
- Responsible for overseeing the recruitment, induction, appraisal and training of all staff.
- Plan for, arrange and report on performance management and staff development aspects for all support staff.
- Responsible for ensuring that aspects of the Workforce Agreement are adhered to, in relation to administrative functions being passed to support staff, to ensure that appropriate support staff structures are in place to undertake these tasks.
- Collaborate with and advise the Senior Management Team on staffing issues incorporated in strategic and operational planning.
- Know about the main health and safety and fire safety issues specific to the Federation and how they relate to students, staff, visitors and contractors.
- Responsible for the letting of the Federation premises to outside organisations and Federation staff.
- Collaborate with the Executive Head, SLT and Premises Manager on formulating comprehensive disaster and recovery plans and operating the elements linked to the resources management responsibility, and implementing risk management and loss prevention strategies in the Federation to reduce insurance costs. Jointly responsible, with the Premises Manager, for implementing the approved insurances and handling any claims that arise and obtaining the necessary licences and permissions and ensuring their relevance and timeliness.
- Manage the administrative function, including the Federation schools reception, reprographics and records.

- Collaborate with the Federation IT and Network Manager on the general management of the administrative ICT facilities, the implementation of appropriate Management Information Systems and the full computerisation of the administration accounting and record system, including top desk publishing.
- Oversee the maintenance of pupil records including the assessment process and act as correspondent for the DfES and be responsible for records and returns as required.
- Support the school's Management Team, contributing to and taking an active part in all meetings, where necessary, strategic planning processes and development of initiatives.
- Formulate and update policies on behalf of, and for ratification by, the Governing Body relating to areas covered by the role.
- Responsible for the promotion of the Federation to different audiences and raise the profile within the local community, and work with local businesses for fundraising, arranging vocational experience and joint projects.

## PERSON SPECIFICATION

Attribute	Essential	Desirable	Method of Assessment
Management	<ul style="list-style-type: none"> <li>◦ School Business Management</li> <li>◦ Line management</li> </ul>	◦	◦
Experience	<ul style="list-style-type: none"> <li>◦ DfES, LEA, Learning Skills Council and school financial regulations and procedures</li> <li>◦ DfES and LEA regulations relating to non-financial issues</li> <li>◦ School standard operating procedures</li> <li>◦ National Curriculum requirements</li> </ul>	◦	◦
Practical Skills	<ul style="list-style-type: none"> <li>◦ Excellent numeracy and literacy skills</li> <li>◦ Excellent computer skills</li> <li>◦ Ability solve urgent problems and multi-task</li> <li>◦ Ability to demonstrate organisational ability</li> </ul>	◦	◦
Communication	<ul style="list-style-type: none"> <li>◦ Excellent written and verbal communication skills</li> <li>◦ Ability to fulfil all spoken aspects of the role with confidence and fluency in English</li> </ul>	◦	◦
Personal Qualities	<ul style="list-style-type: none"> <li>◦ Diplomatic</li> <li>◦ Good negotiation skills</li> </ul>	◦	◦
Strategic Thinking	<ul style="list-style-type: none"> <li>◦ Experience of working at strategic level within an educational environment</li> </ul>	◦	◦
Technology / IT Skills	<ul style="list-style-type: none"> <li>◦ Excellent IT skills including the use of Microsoft Office applications</li> </ul>	◦	◦
Education and Training	<ul style="list-style-type: none"> <li>◦ School Business Management Qualification and postgraduate/advanced qualification</li> <li>◦ Training on the Data Protection Act and the Freedom of Information Act</li> </ul>	◦	◦
Equal Opportunities	<ul style="list-style-type: none"> <li>◦ Devon County Council and it's staff have a Statutory obligation to implement anti-discriminatory and equal opportunities when carrying out their duties</li> </ul>	◦	◦ Demonstrate knowledge at Interview
Physical	<ul style="list-style-type: none"> <li>◦ Able to carry out the duties of the post with reasonable adjustments where necessary</li> </ul>	◦	◦ OH1
Other relevant factors	<ul style="list-style-type: none"> <li>◦ Commit and conform to DCC Customer Service Standards</li> </ul>	◦	◦

## **Supervision and Management:**

The jobholder will directly line manage up to twenty staff, i.e. a team of Administrators (whose roles cover a variety of secretarial and clerical tasks and responsibilities); a Federation Personnel Officer who is responsible for the personnel function of the Federation; Finance Administrator who are responsible for the day-to-day ordering, invoicing and income for the school.

## **Creativity and Innovation:**

Deployment of staff where necessary, providing the necessary resources to fill requirements within existing financial resources; provision of administration services; personnel management and financial management.

Examples could include:

Provision of administration services – implementation of a new parent/tutor consultation scheme which necessitates a complex appointments system. The postholder would develop the new system, taking into account requirements of staff, students, parents. Consideration of implications on support staff, catering, transport and site issues. Devise an IT booking management system which is effective, efficient, manageable. Identification of staff in Federation to carry out tasks involved and negotiate with members of admin staff to alter working practices in for this assignment to be carried out within limited timescales and using existing resources.

Personnel management – development of creative approaches to working practices, dealing with problems of working relationships, difficulties in recruitment of support staff, unsatisfactory performance or conduct of support staff. There will be a need to resolve complex personnel and work related issues.

Financial management – for example, line manager of Federation administration service – ensure service is run on business lines and does not run at a loss, which could result in a detrimental effect on the school's budget. The financial aspects have to be incorporated into the school's normal financial management system,

Overseeing the monitoring of the Federation budget and resulting carry forward over the next three year period to assess budgetary needs and recommend strategies to resolve problems.

There will be a requirement to oversee the management of the DBS check processes; manage staff contracts and arrange rotas to ensure essential areas of work can be covered if any team members are unexpectedly absent. There will be a need to investigate potential investment possibilities and produce appropriate reports which ensure that cost savings can be identified, where applicable.

## **Links with other officers, Service users or Members of the Public:**

Support Executive Heads, Governors, Senior Management Team, teaching staff, students, parents/carers, Local Education Authority, candidates for vacancies external contacts and other stakeholders.

There will be regular and frequent contact with team members regarding their roles, cover for absence colleagues, problems and advice to ensure the continual smooth running of administrative processes;

Liaison with administration network users regarding software access levels and security, software and hardware problems, to ensure the security of the network and correct level of hardware provided;

Liaison with finance team members to ensure financial policy compliance and with the Devon Audit team during their financial audit of Federation accounts;

Liaison with the Executive Headteacher and deputies regarding administrative team, financial and personnel issues; with all staff regarding personal issues e.g. absence, pay and leave; with Devon Finance Services regarding budgetary issues;

Liaison with Devon County Council Records Disclosure Office regarding individuals applications for disclosure and with Devon County Council HR regarding staffing issues.

Line management issues – provision of guidance, support, advice and responsibility for quality assurance of work, raising difficult issues with individuals regarding working relationships, workload issues, poor performance, conduct, attendance. Negotiation with staff when changes in responsibilities are needed.

Communication and discussion of regarding requests and their outcomes (positive and negative).

At all times, the postholder needs to handle issues with fairness, diplomacy, persuasion and sensitivity to ensure that staff morale and performance is not affected negatively.

### **Levels of Responsibility:**

Development of strategic proposals for effective redeployment of staff, line management and structure in order to satisfy the requirements of education initiatives, legislation, school development plans, changes in skills and knowledge requirements and school structures.

Pay and grading of support staff, both existing and new posts, in accordance with school's pay policy and structures.

Full contribution to the decision making process when serving on interview panels.

Overseas development of policies, e.g. first aid provision, lettings, communications.

Budget plans – working with the Executive Head – development of annual budget plan according to income available and planned expenditure – presentation to Governing Body for ratification.

Freedom to make decisions on changes to working practices and hours of work for reportees, internal financial systems and procedures, agreement for unplanned expenditure, appropriate funding streams, best value/value for money decisions.

### **Effects of Decisions:**

The jobholder will play a full and equal part with colleagues in deciding policy, strategic planning and implementation relating to all aspects of the school's activities. Decisions on staff development lead to an appropriately trained and skilled workforce and an increase in staff morale; decisions on financial management have a direct affect on the quality of teaching and learning in the school; decisions on support systems have an effect on the successful operation of an educational function and maintaining confidence and confidentiality. These decision-making processes are responsible for school effectiveness and improvement.

Staff development – use judgement to decide on best method of delivering professional development requirements, whilst taking into consideration budgetary restraints. These decisions lead to an appropriately trained and skilled workforce and an increase in staff morale.

Financial management decisions have a direct effect on the quality of teaching and learning in the school, i.e. ensuring school development plan is being adhered to and targets being met.

Support systems – postholder is responsible for taking action when systems fail or problems are detected – consequences are successful operation of a function (examinations, parents evening) and maintaining staff and student confidence or protecting the Federation's reputation.

### **Resources:**

The jobholder will be responsible for ensuring that secure and effective procedures for handling income are in place and are being adhered to by finance and catering staff; responsible for proper use of a PC, printer and fax machine; accountable for proper and secure use of specialist school finance and personnel IT management systems, and maintenance of manual personnel and financial records in accordance with statutory requirements.

### **Work Demands:**

There will be daily interruptions to scheduled work such as Executive Head requests throughout the day; a member of support staff requesting an urgent confidential meeting.

There will be annual deadlines such as the production of a budget plan for ratification by Governors on a specified date and end of year financial closedown procedures carried out in accordance with a published timescale. There will be monthly/termly deadlines such as providing information to Governors at least seven days in advance of a scheduled meeting. There will be weekly deadlines such as the transcription and distribution of minutes for team meetings, and deadlines relating to the recruitment of staff.

The jobholder will be required to deal with the many aspects of the job, which are of equal importance.

Interruptions could consist of immediate solutions to workloads problems experienced by support staff, e.g. additional invigilator required for an ongoing exam, receptionist on sickness absence.

The Business Manager is a key, pivotal role in the Federation, and will be the first contact for many problems and issues as they arise, therefore interruptions and deadlines have to be managed effectively on a continuous basis, with a calm professional approach, whilst ensuring the Executive Head and Heads of School, students and workforce are treated with equal importance at all times.

Conflicting work priorities consist of providing information, guidance, advice and support to different groups of people (teaching and support staff, students, other stakeholders).

Also juggle core roles of budget management, line management of admin functions including personnel, and learning resources.

Financial monitoring to assist the Federation in making decisions about expenditure, whilst at the same time shortlisting for a vacancy, preparing for senior management strategic planning meetings – these all provide examples of providing a service to many customers in the same time frame. Being a Federation of schools there are many unscheduled meetings which need to be attended to – in addition to the already scheduled meetings which happen on a regular basis.

### **Physical Demands:**

The role will require normal physical effort and there will be a requirement for high IT use, for data manipulation, word processing and email.

### **Working Conditions:**

The role will be performed in a heated, lit and ventilated indoor environment.

### **Work Context:**

The role will pose normal office-based health and safety risks such as the operation of office equipment.

### **Knowledge and Skills:**

The role will require comprehensive experience of finance, including budget planning, management and monitoring of the Federation budget and other sources of income, including the use of specialist IT packages, and reconciling financial data between the Federation and LEA; personnel experience; support service experience; performance management experience; experience of advising a Senior Management Team, Governors and other staff, and contributing to the leadership and management of whole Federation of schools issues and implementing operation



plans arising from the Federation improvement plans and decisions made by the management team or governing body.

There will be a requirement from the jobholder to be highly proficient in the following:-

- Good communication, both written and verbal
- Financial and Cost Accounting
- Use of ICT, in particular Excel, Word, Access
- Health & Safety
- Project Management
- Statistical Management
- General Site Management

The Post Holder must have the ability to use their highly developed and specialist skills to confront and embrace complex problems in a number of distinct areas including: -

- Recruitment
- Change Management
- Succession Planning
- Training
- Issues impacting and effecting the wider area of Education within the Federations Primary & Nursery Schools
- Employment legislation.

There are a significant number of policies and legislative documents impacting on the work of the Post Holder and the operation of the Federation. Dependant on the relevancy, the knowledge of the Post Holder will range from possessing a basic understanding to that of a full and detailed understanding. Examples being: -

- Every Child Matters
- The Children's Act
- Child Protection
- Health and Safety
- Employment Protection Rights Act
- Data Protection Act
- Freedom of Information Act

### **Health & Safety:**

The purpose of this section of the JD is for the manager to identify the main H&S risks associated with the job with a view to making the job-holder aware of them. This list is not exhaustive and does not replace the Risk Assessment document.

The "Action to be taken" section should be completed and reviewed on an individual basis with job-holders.

Potential Hazards	Applicable to this job? (✓)	Action to be taken
Display Screen Equipment		
Electricity – fixed / portable		
Manual handling		

Verbal / physical abuse		
Work equipment		
Fire		
Environmental		
Isolation / lone-working		
Slips, trips & falls		
Chemical		
Working with Vulnerable persons		
Premises related		
Transport risks		
Working at heights		
Other		

## Signatures:

### Job Description agreed by:

**Line/Originating Manager:**

**Date**

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**Job Holder**

**Date**

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**Head teacher**

**Date**

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