



Creating a Community of Excellence

Job Title	Federation Business Manager
Grade/Salary Range	Scale RG8b (scp 39-42)
Hours of Work	Full Time – 52 Weeks Per Year
Hours of Work	As per Contract

Supporting The Federation’s Visions and Values

As a member of staff within the Federation the post holder is required to:

1. consistently conduct their role in order that the Federation vision is achieved for all children and adults within each Federation
2. continually contribute to the Federation’s success through its vision statement and modelled behaviour towards anyone in the Federation
3. be an excellent role model by being reflective and demonstrating a desire to improve and learn
4. lead by example to motivate the work of others including the willingness to change
5. safeguard all children by ensuring the Federations’ policies on Safeguarding, Health and Safety, confidentiality and data protection are rigorously implemented and promoted at all times
6. promote a culture of inclusion within the Federation as a whole where all views are valued and taken into account
7. contribute to the Federation self-evaluation and improvement process to embed and maintain a good or better Federation against OFSTED criteria
8. contribute to the development, implementation and monitoring of the Federation Development Plan (SDP) and associated action plans and Federation policies
9. ensure that everyone feels safe at all times and incidences of bullying are reported to a member of Senior Teaching & Learning staff to deal with swiftly and fairly

Statutory Responsibilities of the Role

This role has no statutory qualifications but is expected to access all opportunities for continued professional development training.

The post holder should also understand the statutory roles of teaching staff, along with maintaining a knowledge of the:

- a. Schools Financial Value Standard and Assurance
- b. The School Business Management Competency Framework
- c. Ofsted: The Framework for Federation Inspection
- d. Berkshire LSCB Child Protection Procedures

Financial Accountability

The post holder has the accountability for the performance of the Federation revenue budgets across Park Lane Infant Federation, Park Lane Junior Federation and Moorlands Primary Federation which exceeds £4m across the Federation.

The post holder also has the direct accountability for the capital budget of £20k and the Voluntary Federation Funds which is held at £30k per academic year across all the above named sites.

These figures rise annually.

Designation of Post within the Federation Structure

The post holder:

- is directly accountable to the Executive Headteacher and the Governing Body and has indirect accountability to the Heads of Federation at each location
- acts as the Federation's named advisor on Health and Safety
- is required to lead and work with the administrative service teams to ensure the smooth running of the schools across the Federation
- is a member of the Senior Leadership Team of the Federation and will attend leadership meetings at any school within the Federation
- has the direct accountability to lead the ongoing strategic development and delivery of administrative services and all Federation support services
- is accountable for the direct line management of the office and premises staff (based across the Federation)
- is required to attend and lead meetings, along with providing appropriate reports to the Governing Body of the Federation as requested by the Head of Federation or Executive Headteacher

Main Purpose and Duties of the Role

The Federation Business Manager is responsible for:

1. Leadership and Management

a) Strategic Planning and Direction

- Providing strategic leadership in financial management to ensure the long term sustainability of the Federation
- Working as part of the Senior Leadership Team in the development of policies and plans ensuring that the objectives and priorities are implemented and reviewed systematically
- Providing advice and guidance to the Executive Headteacher, Senior Leadership Team and Governing body in developing new initiatives and managing change and maintain an oversight of the services provided to the Federation, including development of those services
- Ensure that all support, administrative, premises, human resources, financial and IT services and systems within the Federation meet current legislation and Federation based policies
- Being accountable for all Support Services within the Federation and their leadership, development and delivery
- Being accountable for the production of an annual plans for the bought back services, analysing and interpreting the future role and requirements of the administrative and support services in order to meet the Federation's business needs within budget or via negotiation with Executive Headteacher and Governing Body over budget contribution
- Working with the Executive Headteacher and Governing Body to provide leadership and direction on strategic projects, partnerships and developments

b) Governing Body

- To create and maintain positive working partnership with the Governing Body, in conjunction with the Executive Headteacher
- To attend a variety of meetings with the Governing Body to deliver reports, bid proposals and recommendations for their endorsement
- To ensure policies agreed by the Governing Body are maintained on the appropriate websites
- To deliver appropriate clerking services to the Governing Body as requested

c) Line Management

- Assuming sole responsibility for the delivery of appropriate supervision of the office and premises staff (at any location) and this encompasses:
 - Supervision meetings
 - Performance Appraisal
 - Capability & Performance Management
 - Disciplinary Procedures
 - Risk & DSE Assessments
 - Team Meetings & briefing sessions
 - Identification of training requirements
 - Absence Management
 - Cover arrangements within resource available
 - Induction
- Conducting periodic monitoring checks on performance management of others by reviewing the supervision records
- Providing strategic overview and advice to the Office and premises staff on any issues relating to the performance of other administrative or support staff across the Federation
- Conduct, at minimum, management meetings with those directly managed to receive updates on performance and monitored plans and to cascade information

2. Financial Management

a) Annual Preparation and Forecasting

- Developing and compile budgets and forecasts so that the Executive Headteacher, Heads of School, Governors and Senior Leadership Team members are given timely and accurate advice on all financial and related business matters.
- Generating bid proposals in order to secure funding for the Federation from any available and appropriate sources
- Liaising with the Local Authority to provide statistics and monthly returns to them and any other key stakeholders
- Formulating annual capital and expenditure budget forecast and associated delivery programme for the approval of the Executive Headteacher and Governing body
- Continually preparing future forecasting and conduct formal briefing sessions with the Executive Headteacher and Chair of the Governing Body
- Ensuring all financial arrangements are in keeping with the Federation's status
- Attending strategic planning meetings as part of the Senior Leadership Team and Governing Body to discuss forecasts

b) Asset Management

- Furthering the development of depreciation and monitoring of the asset management programme to enable a funded cycle of replacement for major physical assets
- Liaising with IT Coordinator to assemble and generate financial forecasts and expenditure proposals over a three year rolling programme for the approval of the Governing Body

c) Operational Finance

- Assume responsibility and overseeing the day to day financial operational activity (currently FMS6) including ordering, payments and reconciliations across all budgets and private school funds
- Conducting daily financial business in line with agreed policies by the Governing Body
- Reviewing all order requests from any member of staff within the Federation
- Providing advice and training to staff re best value and ordering practices
- Processing monthly VAT returns to the Local Authority
- Accessing benchmarking data to produce reports for the Governing Body
- Overseeing and creation of all orders, invoices and receipts
- Overseeing and recording of income for the Federation funds, events and trips etc.
- Reconciliation, data input, processing and approval of all monthly payroll activity including checking timesheets for any overtime worked, discussing prior to approval with Executive Headteacher and addressing any issues on their behalf
- Liaising with the Heads of School to ensure accuracy of supply teacher invoices and securing recoupment under the insurance policy

d) Monitoring

- Lead budget monitoring meetings with the Senior Leadership Team and Governing Body – delivering reports and recommendations and formulating action plans
- Conduct monthly full reconciliation of all accounts held by the Federation
- Monthly reconciliation of bank statements across the Federation
- Preparing income and expenditure returns to the Local Authority across the Federation
- Prepare and brief the Executive Headteacher on a monthly cash flow report across the Federation
- Provide termly briefing to Budget holders across the Federation, discussing any concerns with them re expenditure forecast
- Ensuring risk management and loss prevention strategies are in place and meet current requirements
- Being responsible for developing the financial aspects of the Federation Improvement Plan: monitoring its performance, ensuring alignment to staffing and finance plans and presenting regular reports to the Senior Leadership Team and the Governing Body
- Liaising with all budget holders within the Federation to ensure their forecasting is accurate for the coming academic year
- Leading in the securing of funds for the Federation to achieve its goals and objectives. This includes statutory, consultancy and charitable sources of funding nationally and within the local business community
- Prepare an out-turn report on revenue fund and capital budget to Executive Headteacher and Local Authority on a termly basis – creating forecasts and projections across the Federation
- Print Consistent Financial Report (CFR) and conduct monthly audit of CFR against Local Authority report from their own payment database (Oracle) across the Federation

3. Procurement and Delivery of Services

- a) To lead on the procurement of best value services to enable Federation to deliver its legislative requirements to pupils and staff – this may also include other areas of Federation services which are non-legislative but required
- b) To prepare specification document for onward issue to companies in order to receive bid proposals to evaluate, ensuring best value is paramount for the Federation
- c) To assume the responsibility of the delivery and management of agreed service Level Agreements and standards and quality output are being achieved for the Federation
- d) To assume responsibility for the formal evaluation of service providers (including the Local Authority) and advise Governing Body of service level assessments in order for them to reach a decision
- e) To conduct interviews and evaluation meetings, where required, with external contractors to assess suitability for the Federation's requirements
- f) To conduct formal evaluation leading to final set of financial and benefit recommendation papers to the Governing Body in order to achieve final budget setting for the coming academic year within set timescales

- g) Securing insurance policies which offer best value for the Federation
- h) Securing leasing that offers best value for the Federation, ensuring that all new contracts are approved by the Local Authority prior to acceptance
- i) Conduct monitoring meetings with service contractors to ensure robust delivery of the agreed Contract, addressing any issues and overseeing agreed action plans or resolutions

4. Local Business and Community Engagement

- a) To create and maintain positive relationships with local businesses so that their corporate social responsibility (CSR) programmes benefit the Federation and its community
- b) To work with local business to generate goodwill, donations, mentoring to benefit the Federation and its pupils
- c) To promote and develop extended Federations activities to the community
- d) To create an engagement programme whereby pupils have access to local businesses to develop their aspirations
- e) Ability to generate income for the Federation in partnership with local business (donations or time from their employees)

5. IT and Communication

- a) Develop and monitor the Federations communication system, ensuring that good communications are maintained between the Federation and its stakeholders
- b) Ensure ICT and telephone systems support the efficient running of the Federation
- c) Ensure that financial systems within the Federation, including SIMS (or appropriate alternative systems), meet the requirements of legislative framework, follow sound practice, have clear accountability and are closely monitored
- d) Conduct monitoring meetings with IT contractors to ensure robust delivery of the agreed Contract, addressing any issues and overseeing agreed action plans or resolutions

6. Human Resources

a) Policies and Procedures

- Be responsible for ensuring HR policies are in place, are regularly reviewed and updated and that advice is available to managers
- Ensure that good personnel practice is followed throughout the Federation that is based on the Federation's and Local Authority's Human Resources Policies and the Federation's policies endorsed by the Governing Body are implemented
- Ensure that a Staff Development Policy and Programme is initiated for the support services staff and successfully delivered
- Accountability for the delivery of the legislative requirement to deliver an annual workforce census
- Ensure that the Pay and Conditions for all staff meets statutory and Legislative requirements
- Conduct and appraise job description to meet the changing needs of the Federation

b) Personnel Management

- Taking responsibility for leading on the recruitment procedures for any staff
 - Preparing a robust business case and appropriate documentation for approval to recruit by the Executive Headteacher and Governing Body
 - Identification of potential efficiency savings by reviewing the vacant role within the wider service context
 - Seeking to make efficiencies or cover within the service to avoid additional cover or recruitment costs
 - Conducting advertising, selection, shortlisting, preparation of interview criteria, questions and testing and conducting interview
- Work with Executive Headteacher in confidential staffing matters including disciplinary, capability or performance related matters

- Ensuring that probationary period requirements are followed and completed within agreed timescales for all non-teaching staff
- Working as part of the Senior Leadership Team to ensure all annual salary reviews are robust and reported accurately to the payroll provider
- Working as part of the Senior Leadership Team to ensure that the Federation’s staffing establishment is monitored and can respond to new requirements through appropriate agreements and consultation
- Ensure Federation’s obligations to the health and wellbeing of staff are met, including risk assessments and occupational health referrals
- Review Risk Assessments for staff on site awaiting their final Disclosure and Barring Service check – reviewing any concerns with the Executive Headteacher
- Maintain the Single Central Record and conduct termly review with representative of the Governing Body and Executive Headteacher to ensure accurate and up-to-date records

c) Operations

- Ensure that paperwork associated with the appointment of staff i.e. Disclosure and Barring requirements, induction and safeguarding training is completed within an agreed or timely manner
- Ensure that paperwork associated with staff resignations or leave of absence is completed within an agreed or timely manner
- Ensure all staff records, including absence and personal information held by the Federation are accurate and up to date and the Local Authority receives regular updated information
- Ensure completed returns to the Local Authority within required timescales

7. Premises

- a) Lead on ensuring that all premises related actions are undertaken and delivered within a timely manner
- b) Develop strategies for the effective and efficient management of the Federation’s facilities, including the buildings and equipment
- c) Ensure that all annual service checks by any contractor or LA are completed and action plans created accordingly to rectify any identified issues
- d) Monitoring use of energy and advising Governing Body on the improvements achievable across the Federation to minimise the carbon footprint of the sites
- e) Ensure building and maintenance schedule is kept up to date and implemented
- f) Ensure that maintenance and building contracts are tendered to comply with the Local Authority Code of Practice on Purchasing Goods and Services and with the financial limits agreed by the Governing Body
- g) Be accountable for all premises issues relating to the site including resources, ensuring that inventories are maintained
- h) Be accountable for all letting of the buildings and grounds within the Federation’s policies, maximising income but ensuring minimum disruption to the pupils
- i) Be accountable for the maintenance of the Federation grounds ensuring the safety of the pupils
- j) Lead on the Condition Survey activity on behalf of the Governing Body – addressing any outcomes and preparing forecasts for expenditure and bids to complete actions
- k) Lead on the annual Fire Safety inspection on behalf of the Governing Body – addressing any outcomes and preparing forecasts for expenditure and bids to complete actions
- l) Ensure the completion of an annual maintenance plan with projections for a rolling five year programme

8. Health and Safety

- a) Accountability for leadership of the Federation’s health and safety obligations, ensuring all practices and policies adhere to current legislative guidance
- b) Ensure that health and safety training is delivered at the appropriate level and that all staff retain an up-to-date awareness of changes in legislation, including first aid, fire safety, safe handling etc.
- c) Participates in inspections and audits across the Federation, ensuring that action is taken to rectify any issues
- d) Ensure that the site controllers maintain accurate documentation including COSHH and individual school Rainbow Plan

Person Specification

This post is subject to an Enhanced DBS Check within the legislative framework of the Disclosure and Barring Service

Specific Requirements

The post is subject to completing Level 3 of Health and Safety responsibilities for Federation

- The post is also subject to attend any identified training to further their development and the development of Federation

Qualifications and Experience

- High general standard of education – A level English and Mathematics (or recognised equivalent)
- Advanced Diploma of Federation Business Management qualification (ADSBM) or relevant professional management qualification
- Professional recognised accountancy qualification
- National Examination Board in Occupational Safety and Health (**NEBOSH**) qualification is desired but not essential – will be expected to be attained if not held
- Previous senior management or leadership experience – including line management responsibilities
- Previous experience of intermediate working with MS Office packages (word, excel, outlook)
- Experience in resource management, forecasting and report creation
- Awareness and understating of Federation/public sector finance/resources management information systems
- Ability to write, present and succeed in the submission of bids securing funding in the public sector
- Experience of budgetary management and control within a large organisation
- A working knowledge of facilities management
- A working knowledge of Health and Safety legislation
- An understanding of procurement, contracts, risk assessment, health and safety and traded services in organisations
- Experience of working effectively with a wide range of external partners
- An understanding of Federation management issues and the role of the Governing Body
- Knowledge and experience of a variety of financial management systems and processes and procedures
- Ability to make decisions on own behalf without the need to refer to the Executive Headteacher

Required Skills and Abilities

Leadership and Management

- Ability to prioritise, allocate and plan workload of self and others including management deadlines
- Ability to consult and share decision making with the senior team
- Ability to lead on initiatives or projects in support of Federation strategic plans and goals – encouraging others to change and able to implement/negotiate change successfully
- Ability to lead, organise, develop and motivate staff, along with an ability to work within a team
- Ability to evaluate complex issues and foresee implications, taking decisive and effective action to tackle professional challenges
- Ability to work with others in a positive manner
- Ability to interpret legislation and regulations
- Ability to understand and advise others on Federation policies and codes of practice

Budget

- Ability to understand and interpret financial regulations and systems
- Ability to conduct financial risk assessments
- Ability to create bids and proposals
- Ability to guide others in budget management

Local Business and Community Engagement

- Ability to create positive, sustainable working relationships with others
- Ability to negotiate and achieve positive outcomes

IT and Communications

- An ability to analyse data and evidence of higher level ICT skills
- High standard of communication skills leading to the development of positive relationships with external partners and agencies and contractors
- Able to input, retrieve and interpret data accurately as required from a variety of manual and IT systems

Human Resources

- Ability to lead recruitment
- Ability to manage others and address performance issues
- Skills and confidence to coach and mentor staff and tackle underperformance
- Ability to set and monitor performance action or improvement plans
- Ability to recognise achievement, motivate and provide constructive feedback

Self-Management

- Being accurate and well organised in approach to work
- Ability to self-evaluate learning needs and actively seek learning opportunities
- Highly developed standard of demonstrable interpersonal and communication skills – including ability to handle challenging situations
- Ability to determine and identify own continuous development needs
- Understand the rules of strict confidentiality and safeguarding practices of Federation
- Ability to work under pressure and set and meet pre-determined deadline where they may change at short notice
- To be flexible and adaptable to the wide range of duties undertaken
- Able to produce accurate and well-presented work
- Willingness to undertake training and learn new systems
- Ability to resolve discrepancies without disruption to service
- Ability to present to a wide range of stakeholders

Agreement

This Job Description is not your Contract of employment or any part of it.

It is prepared for the purposes of Federations’ structures and may change either as your Contract changes or as the organisation of the Federation is changed. All changes will include a consultation period.

This document must not be altered once it has been signed. This document will be reviewed annually by the Governing Body of the Federation of Moorlands and Park Lane Primary Federations.

Signed - Post Holder	
Date	

Signed – Executive Headteacher	
Date	

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