

## BOUGHTON PRIMARY SCHOOL – AN ACADEMY

### JOB DESCRIPTION

UPDATED SEPTEMBER 2025



|                 |                            |
|-----------------|----------------------------|
| JOB TITLE       | School Business Manager    |
| LINE MANAGER    | Head Teacher               |
| RESPONSIBLE FOR | Non-teaching support staff |

Boughton Primary is committed to safer recruitment, safeguarding and promoting the welfare of children, and expect all staff and volunteers to share this commitment.

The school's recruitment and selection policies/processes follow DfE guidance 'Keeping Children Safe in Education' by adhering to statutory responsibilities to check staff who work with children, taking proportionate decisions on whether to ask for any checks beyond what is required.

### Main purpose

The School Business Manager (SBM) is the school's leading support staff professional and works as part of the Senior Leadership Team to assist the Head Teacher in their duty to ensure that the school meets its educational aims.

As a standalone academy, the SBM is also the school's Chief Financial Officer (CFO), reporting to the Head Teacher (Accounting Officer – AO) and the board of governors.

The SBM is responsible for:

- Managing the strategy and operation of the business functions of our school, including financial management, estate management, health and safety, human resources, management information and ICT, compliance and administration.
- Implementing 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.
- Providing professional leadership and management of school support staff, in partnership with senior leaders and teaching staff, to enhance their effectiveness in order to achieve high standards of learning and achievement in the school.
- Promoting the highest standards of business ethos within the administrative function of the school, strategically ensuring the most effective use of resources in support of the school's learning objectives.

### Duties and responsibilities: overview

Leadership and strategy, including marketing

Financial management and income generation

Human resources

Estate management, including health and safety

Management systems and ICT infrastructure

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

## **Leadership and strategy**

- › Under the direction of the Head Teacher (AO) 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
- › Plan, manage and implement school-wide changes and allocate resources in line with the school strategy 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
- › Implement a marketing plan for the school, which utilises the school website, signage, the prospectus, and communications with current and prospective parents/carers, staff and stakeholders
- › Monitor developments in technology and consider how it can be used to enhance the school's business processes, teaching and learning, and staff wellbeing
- › As a member of the senior leadership team (SLT), attend SLT meetings; negotiate and influence strategic decision-making within this forum
- › Line manage non-teaching support staff, including carrying out long-term resource planning and managing recruitment, appraisal and professional development
- › As Chief Financial Officer (CFO) attend all Resources Committee meetings; report to governors at these; support discussions regarding personnel matters and complete agreed actions afterwards
- › In the absence of the Head Teacher, take delegated responsibility for financial and other decisions, unless otherwise directed by the Governing Body.

## **Financial management and income generation**

- › Prepare, manage and monitor the school's budget, ensuring it is balanced, realistic, and represents an effective use of public funds; submit the budget to the Head Teacher and governors for approval
- › Monitor the budget all year round, identifying significant variance, responding to unforeseen developments, advising the Head Teacher where revisions or changes are needed and taking prompt action
- › Forecast future years' budgets, based on the school's estimated funding, trends in pupil numbers and expenditure and the needs of the school's Strategy Plan, to enable the Head Teacher and SLT to make strategic, long-term decisions
- › Comply with financial reporting requirements and submit statutory returns on time
- › Prepare the school's accounts for annual audit from the accountants, collecting the required information from the Head Teacher and governors, and providing everything needed for the accounts to be approved
- › Oversee school bank accounts on a day-to-day basis, ensuring money is banked, invoices are paid promptly, money owed is collected in a timely manner, and clear records are kept
- › Advise the Head Teacher and governors if fraudulent activities are suspected or uncovered
- › Monitor the effectiveness and implementation of any financial agreements, contracts, SLAs
- › Manage all policies related to financial management, ensuring these are updated as required
- › Develop and implement the school's fundraising and income generation strategy; identify additional finance required to fund proposed activities in partnership with the SLT and in line with the school's Strategy Plan; seek funding streams for these, including grants or bids; present timely, costed proposals to the Head Teacher for approval
- › Be a named trustee for the Boughton School Association (PTA) and support their fundraising activities, working with the chair and treasurer, attending meetings or events when needed
- › Lead on procurement processes, managing tenders where appropriate, conducting due diligence, benchmarking and evaluating suppliers, negotiating deals and ensuring value for money
- › Manage the school's lettings offer; maximise income through lettings and other activities

## **Human resources**

- Lead on HR and personnel management in school, working in partnership with the school's chosen HR provider; seek and make use of specialist expertise in relation to HR issues; advise the Head/SLT on HR issues
- Manage the school's payroll provision for all staff with the payroll provider, including the management of pension schemes and associated services
- Manage policies related to staffing, ensuring that recruitment, appraisal, staff development, attendance/absence, grievance, disciplinary and redundancy policies and procedures are administered in accordance with employment law, safeguarding requirements and equality legislation
- Manage all processes related to staffing and recruitment, including advertising, liaising with candidates, conducting all safer recruitment checks (DBS, barred list, section 128), keeping a record of these and maintaining the school's Single Central Register; be the point of contact for external scrutiny of the SCR
- Conduct reviews of the school's staffing structure to ensure effective deployment of staff and financial efficiency
- Manage staff absence, including procuring supply or fixed-term staff, recording absences, managing return to work interviews and referrals to Occupational Health, involving the Head Teacher when necessary and working in partnership with the Head Teacher/SLT to manage and support phased returns to work, and ongoing wellbeing support
- Manage induction of new staff
- Support the Head Teacher/SLT in identifying the skills, knowledge, understanding and experience required to help the school achieve its educational objectives, finding opportunities to enhance the workforce whenever possible, within budgetary constraints.

## **Estate Management, including Health and Safety**

- Follow the Estate Management guidance; develop an Estate Management plan in consultation with the Head Teacher and governors
- Manage the maintenance of the school site, including the purchase or repair of furniture and fittings, redecoration, ensuring all areas of the building and site are fit for purpose
- Ensure the supervision of relevant planning and construction processes is undertaken in line with any legal requirements or contractual obligations
- Ensure the safe maintenance and security operation of the premises, providing a secure environment in which teaching and learning can be provided
- Ensure the continuing availability of utilities, site services and equipment
- Monitor, assess and review contractual obligations for outsourced school services, including catering and cleaning; ensure these are managed effectively and liaise with contractors when improvements or changes are required
- Manage the letting of school premises to external organisations for the development of the extended services and local community requirements
- Seek professional advice on insurance, advise the HT on appropriate insurances for the school and implement and manage such schemes accordingly
- Manage the school's compliance with health and safety regulations, and put in place processes and procedures to ensure the safety of all in the school
- Organise health and safety training, including fire safety, for staff
- Act as the school's Health and Safety Co-ordinator and Fire Officer
- Plan, instigate and maintain records of fire practices and alarm tests

- › Ensure the school's Health and Safety Policy is reviewed annually and shared with all stakeholders; ensure the policy is implemented at all times, and carry out regular checks of this, including regular monitoring of hazards and risk assessments; report to governors using the school's Health and Safety audit checklist three times per year; ensure any ongoing hazards are captured within the school's Risk Register
- › Oversee statutory obligations for pupils with special educational needs and disabilities, ensuring that the Accessibility Plan is reviewed annually and any actions are addressed promptly

### **Management systems and ICT**

- › Manage all aspects of ICT other than the computing curriculum
- › Liaise with the computing subject lead to develop a hardware plan, to ensure devices and resources are adequate and sufficient for maximising the educational attainment of pupils; follow tendering and procurement policies and processes to increase resources as and when needed, including resources required for staff to fulfil their roles
- › Liaise with the ICT technician/company to manage visits; check with staff regarding any ICT issues and ensure these are addressed by the technician
- › Liaise with the ICT technician/company regarding safe disposal of IT hardware; maintain the ICT and server cupboard
- › Liaise with the MIS provider and ensure its ongoing effectiveness
- › Liaise with the broadband provider and regularly review the provision, based on the needs of the whole school and ensuring best value
- › Liaise with subject leaders regarding IT requirements for their subjects, including schemes of work, online resources and hardware
- › Manage the oversight of staff Acceptable Use Agreements
- › Ensure contingency plans are in place in case of technology failure

### **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 (by relevant staff) in accordance with the policy review schedule, and signed off by governors
- › Monitor and update the risk register, ensuring that governors are apprised of any current or future risks

### **Administration**

- › Keep records in accordance with the school's record retention schedule and UK data protection law, ensuring information security and confidentiality at all times
- › Provide administrative support for the Head Teacher, staff and governing body, as appropriate, including (but not limited to) ensuring they can access the relevant systems needed to fulfil their roles (e.g. email, wifi etc)
- › Work with the school's Data Protection Officer (Plumsun); take responsibility for monitoring data protection compliance and advise the school community on data protection issues
- › Oversee the work of the school administrator as their line manager
- › Prepare information for publications and returns for the DfE and other agencies within statutory guidelines
- › Ensure the school website remains compliant; maintain governance and academy information including publishing the accounts, in line with statutory guidance
- › Maintain governor records on Get Information About Schools (GIAS)

## PERSON SPECIFICATION: SCHOOL BUSINESS MANAGER

| ATTRIBUTES  | Evidence from:  |               |
|---|-----------------|---------------|
|   | Application (A) | Interview (I) |
|   | Reference (R)   |               |
|   | ESSENTIAL       | DESIRABLE     |
| <b>QUALIFICATIONS, TRAINING AND EXPERIENCE</b>  |                 |               |
| Minimum of GCSE Grade C/Level 4+ (or equivalent) in both English and Maths  | A               |               |
| Recognised management/business degree and/or professional qualification(s)  |                 | A             |
| Experience of management within a school or relevant field outside education  | A, R            |               |
| Experience of working in the finance, compliance and HR sectors with knowledge of legislative requirements                            |                 | A, R          |
| Experience of supporting the day-to-day operations of a school or business establishment  | A, R            |               |
| Member of The Institute of School Business Leadership   |                 | A             |
| Experience of managing budgets, generating income, procurement and fixed assets   | A, R            |               |
| Experience of managing change and implementing new systems/procedures/controls  | A, R            |               |
| Evidence of effective leadership and line-management  |                 | A, R          |
| Experience of school self-evaluation and strategic improvement planning   |                 | A, R          |
| <b>KNOWLEDGE, UNDERSTANDING &amp; SKILLS</b>  |                 |               |
| Knowledge of finance, HR and compliance policies in schools (including but not limited to estate management, health and safety, GDPR) | A, I            |               |
| Knowledge of procedures relating to safer recruitment   | A, I            |               |
| Knowledge and understanding of value for money initiatives, including using centralized procurement services                          | A, I            |               |
| Awareness of principles and practice in relation to building services, e.g. fire safety, energy management and conservation           | A, I            |               |
| Awareness of legislation related to health & safety, including the work of contractors on site  | A, I            |               |
| Proficiency in use of Microsoft Office software   | A, I            |               |
| Knowledge of school-based financial management systems  | A, I            |               |
| <b>PERSONAL QUALITIES AND ATTITUDES</b>   |                 |               |
| Ability to establish and develop effective working relationships with all stakeholders  | A, I, R         |               |
| Ability to communicate well in writing and orally   | R               |               |
| Flexible and approachable; professional but personable  | A, I, R         |               |
| Ability to self-motivate and use own initiative; can work under pressure to meet deadlines  | I, R            |               |
| Commitment to the highest standards of child-protection, safeguarding and confidentiality   | A, I, R         |               |
| Indicates a commitment to our ethos and values, promoting these for the benefit of all pupils   | A, I, R         |               |
| Indicates a commitment to our school's wider community, including being able and willing to attend out of hours events and meetings   | I, R            |               |