

CAA Academy School Business Manager – Job Description and Person Specification

Organisation(s): Cumbria Academy for Autism

Pay Range: NJC-SCP28 – NJC-SCP35

Contract: Permanent - Full-time

Responsible to: Headteacher and Trust

Responsible for: Admin Support staff team

Main Purpose of Job:

- Financial Resource Management/Chief Financial Officer/Administration Management/ Human Resource Management/ Facilities and Property Management/Health and Safety Management of the School

Responsibilities:

Responsibilities include but are not limited to the following:

- Be responsible for the strategic leadership and management of Academy Finance, HR and other specific projects, areas and activities, as deployed by the Headteacher.
- Carry out a range of complex, sensitive and confidential duties as required by the Responsible Officer.
- Develop and maintain effective working relationships with a wide range of stakeholders using good interpersonal skills in order to obtain and present information, provide advice and carry out duties in relation to all school business matters.
- Negotiate and influence strategic decision making with the school's Senior Leadership Team
- Take delegated responsibility for Financial and other decisions
- Lead and manage all school support staff
- Develop, manage and monitor Business Development Plans.
- Provide clear information, advice and recommendations to the Headteacher, Trustees and Governors, regarding the strategic development of support services, the use of assets and the development of activities.
- Ensure that the Academy makes the best possible use of resources through effective planning, considering all financial and resource management implications.
- Contribute to the strategic and operational development of the Academy.
- Lead, line-manage and support all business and support functions at the Academy.
- Monitor and evaluate progress against agreed objectives and targets, taking any additional action as may be agreed to be necessary.
- Ensure that the impact of astute business development, a focused financial strategy and strong overall management directly affects educational outcomes for pupils at the Academy.
- Ensure that all returns to the DfE, ESFA, Trust, Local Authority and any other relevant body are carried out within predetermined deadlines.
- Establish credibility whilst managing and maintaining strong working relationships with all partners and stakeholders.
- Represent the Academy at local and national networks.
- Promote and market Academy specific services, seek sponsorship and generate additional income.
- Manage the Academy's front of house service building positive links with the community and responding to correspondence and complaints as required.

Specific Responsibilities:

Responsibilities include but are not limited to the following:

Financial Resource Management

- Provide a professional, innovative and entrepreneurial lead in relation to Academy business and finances.
- Set and monitor the school budget in liaison in with the Headteacher.
- Provide the Headteacher, Senior Leadership Team, Members and Trustees with specific expertise and advice in relation to the long-term financial planning for the school.
- Provide accurate analysis of the school budget, identifying trends and potential over/under-spends and provide detailed reports to the Headteacher, Senior Leadership Team, Members and Trustees in a timely fashion when required.
- Develop benchmarking tools that enable the Headteacher, Members and Trustees to assess Value for Money.
- Operate as the strategic finance lead for the Academy, ensuring the completion of all necessary financial management and its timely supply to the Trust.
- Report on financial and compliance matters.
- Interpret financial regulations and provide advice to staff on the effective use of financial systems and procedures.
- Provide support, guidance, challenge and information to budget holders.
- Ensure the school has appropriate financial systems, managing all aspects of Academy finances and be responsible for the effective management of these systems and relevant administration, ensuring compliance with Finance Regulations.
- Inform and monitor the cash flow of the Academy, ensuring the implementation of creditor and debtor policies and procedures, and oversee the management of working cash balances, short-term investments and borrowings.
- Initiate and manage all audit procedures to comply with all audit requirements, for all funds.
- Maximise the potential for the Academy to generate revenue by, for example, proactively seeking and managing additional finance streams including fundraising, bids and asset-management processes.
- Liaise with the Headteacher in developing a traded offer and in brokering partnership agreements aimed at reducing overall costs.
- Liaise with insurance companies regarding insurance cover, claims, dealing with all correspondence and communications.
- Prepare and maintain a business risk register(s).
- Maintain and ensure regular review of data protection, personnel, and ensure that all required procedures are in place and observed.
- Evaluate all available financial information and consult with the Senior Leadership Team and Trustees to prepare a realistic and balanced budget for school activity
- Submit the proposed budget to the Headteacher and Board of Trustees for approval and assist the overall financial planning process
- Discuss negotiate and agree the final budget
- Use the agreed budget to actively monitor and control performances to achieve value for money
- Identify and inform the Headteacher, Members and Trustees of the causes of significant variance and take prompt corrective actions
- Propose revisions to the budgets if necessary, in response to significant or unforeseen developments
- Provide ongoing budgetary information to relevant people
- Advise the Headteacher, Members and Trustees if fraudulent activities are suspected or uncovered
- Maintain a strategic financial plan that will indicate the trends and requirements of the school development plans and will forecast future year budgets
- Identify additional finances required to fund the school's proposed activities
- Seek and make use of specialist financial expertise
- Maximise income through lettings and other activities
- Select types of investments which are appropriate for the schools, taking account of risks, views of stakeholders and identify possible and suitable providers in order to maximise return.

- Present timely and fully costed proposals, recommendations or bids
- Put formal finance agreements in place with suitable providers for agreed amounts, at agreed times and appropriate agreed costs and repayment schedules
- Monitor the effectiveness and implementation of agreements

Human Resources Management

- Inform and implement human resource management policies.
- Ensure compliance with all relevant employment law.
- Support the Headteacher in the implementation of formal and informal HR policies and procedures.
- Ensure all staff have a clear understanding of relevant policies and procedures and that they carry out their duties in line with these policies and procedures.
- Manage the administration of all personnel matters, including recruitment, contracts of employment, conditions of service, insurances, legal and other matters including performance management, discipline, grievance etc.
- Maintain confidential staff records.
- Be responsible for the direct management and supervision of a multi-disciplinary team, including the allocation and coordination of their work, performance management and professional development.
- Ensure that high standards of professional behaviour and performance are maintained.
- To keep up to date with and respond to national developments.
- Manage the payroll services for all school staff including the management of pension schemes and associated services
- Ensure the school's equality policy is clearly communicated to all staff in school
- Ensure that all recruitments, appraisals, staff development, grievances, disciplinary and redundancy policies and procedures comply with legal and regulatory requirements
- Manage recruitment, performance management, appraisal and development for all support staff
- Monitor the relevant legal, regulatory, ethical and social requirements and the effect they have on the school and staff
- Ensure people have a clear understanding of the policies and procedures and the importance of putting them into practice
- Monitor the way policies and procedures are actioned and provide support where necessary
- Seek and make use of specialist expertise in relation to HR issues
- Evaluate the school's strategic objectives and obtain information for workforce planning
- Identify the types of skills, knowledge, understanding and experience required to undertake existing and future planned activities
- Oversee the processing of all new hire paperwork
- Implement policies and procedures at school (e.g. remuneration, holiday/ sick days; recruitment screening, background checks, etc.)

Administration Management

- Manage all relevant administrative/support staff, (including the recruitment, appraisal, training and investigation of complaints);
- Management of compliance with education legal structures including building, finances, personnel, health and safety;
- Complete all statistical returns accurately and promptly;
- Maintain all necessary computerised records, appropriately adapted if necessary.
- Manage the whole school administrative function and lead all support staff.
- Design and maintain administrative systems that deliver outcomes based on the school's aims and goals
- Manage systems and link processes that interact across the schools to form complete systems
- Define responsibilities, information and support for staff and other stakeholders

- Develop process measures that are affordable and that will enable value for money decisions for those managing resources
- Establish and use effective methods to review and improve administrative systems
- Use data analysis, evaluation and reporting systems to maximum effect by ensuring systems are streamlined to maximise efficiency and avoid duplication
- Benchmark systems and information to assess trends and make appropriate recommendations
- Prepare information for publications and returns for the DfE, ESFA, LA and other agencies and stakeholders within statutory guidelines

Facilities and Property Management

- Be the strategic and operational lead for premises and facilitates management at the Academy.
- Be the designated lead for Health & Safety.
- Ensure compliance with all relevant legislation.
- Develop and maintain an Academy-level database detailing Health & Safety compliance.
- Ensure adequate central records of and maintenance schedules as required for buildings, materials, hazardous substances, water, appliances, services etc. as a safeguard for the Academy.
- Develop, implement and quality assurance systems to record and ensure regular testing and maintenance schedules at the Academy.
- Advise the Headteacher and trustees on the delivery of high-quality services for cleaning, catering and grounds maintenance.
- Develop and implement long term strategies, maintenance and premises management plans to ensure that the quality of the estate is sustainable, maintained and improved.
- Inform and maintain an Asset Management Plan(s), database and site(s) master plans, ensuring that accurate data is maintained and that projects and priorities support the educational plans and requirements of the Academy.
- Manage the life cycle costs and replacement of assets to maintain the high standards of the premises and estate.
- Ensure the management and maintenance of inventories and records of all school resources and ensure that staff comply with recognised procedures.
- Be responsible for making decisions regarding the school premises in line with budget provision and operational requirements and evaluating tenders ensuring best value.
- Develop and deliver building improvement projects, liaising with key partners.
- Ensure the supervision of relevant planning and construction processes is undertaken in line with contractual obligations
- Ensure the safe maintenance and security operation of all school premises
- Manage the maintenance of the school site including the purchase and repair of all furniture and fittings
- Ensure the continuing availability of utilities, site services and equipment
- Follow sound practices in estate management and grounds maintenance
- Monitor, assess and review contractual obligations for outsourced school services
- Ensure a safe environment for the stakeholders of the school to provide a secure environment in which due learning processes can be provided
- Ensure ancillary services e.g. catering, cleaning, etc., are monitored and managed effectively
- Manage the letting of school premises to external organisations, for the development of the extended services and local community requirements.
- Seek professional advice on insurances and advise the SLT on appropriate insurances for the school and implement and manage such schemes accordingly.
- Liaise with outside bodies and/or contractors ensuring that the work is carried out within required timescales and to an appropriate standard.

Health and Safety

- Act as the school's Health & Safety Co-ordinator and Fire Officer
- Plan, instigate and maintain records of fire practices and alarm tests.
- Ensure the school's written health & safety policy statement is clearly communicated and available to all people
- Ensure the health & 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 people on health and safety issues
- Ensure systems are in place to enable the identification of hazards and risk assessments
- Ensure systems are in place for effective monitoring, measuring and reporting of health and safety issues to the Senior Leadership Team, Trustees, Governors and where appropriate the Health & Safety Executive

Marketing

- Promote the school to different audiences and raise the profile within the local community;
- Liaise with local businesses for fundraising, arranging vocational experience and joint projects;
- Liaise with external agencies to secure funding for extended school activities.

These duties are neither exclusive nor exhaustive and the post holder may be required to undertake other duties and responsibilities which the Academy Trust may determine from time to time.

General Information:

This job description summarises the main duties and accountabilities of the post and is not exclusive. The post holder may be required to undertake other duties of similar level of responsibility.

It is anticipated that this job description will change over time in accordance with the needs of the role. The role holder will be consulted on any proposed amendments.

It is a condition of employment that staff will not disclose any information obtained in the course of their duties other than to those entitled to receive it. The postholder must ensure that the confidentiality of personal data remains secure and the terms of the Data Protection Act and relevant Trust policies are met in respect of information held on the Trust's computerised systems.

The Trust is committed to equality of opportunity. All staff are required to comply with current legislation, Trust policies and good practice guidance.

This job description should be read in conjunction with the Staff Policy's.

All staff are required to participate in the Trust's appraisal process and undertake any necessary training and development, to keep up to date with the requirements of the job.

An annual review of this job description and allocation of particular responsibilities will take place as part of the Performance Management Review.

Under the H&SAWA 1974 the post holder must take reasonable care of their own health and safety and that of any other person who may be affected by their acts or omissions. The post holder must also co-operate with the Trust on all matters concerning health and safety and not interfere with, or misuse, anything provided for the purpose of health, safety or welfare.

All staff are required to undertake child safeguarding training, adhering to policies and established practices. This post is subject to an enhanced disclosure.

Headteacher's Name: Richard Aindow

Headteacher's Signature:

Date:

Employee Name:

Employee Signature:

Date:

Date Job Description reviewed:

CAA Academy School Business Manager – Person Specification

	ESSENTIAL	DESIRABLE
Qualifications	<ul style="list-style-type: none"> Professional Qualification in relevant discipline ADSBM / ACA / CIMA / CIPFA / ACCA / AAT or equivalent (AF) Educated to GCSE level or above in English and Maths or able to demonstrate ability to work at this level (AF) Project Management Experience (AF, I) Evidence of continuous professional development (AF, I) Be willing to undertake further training (AF, I) 	<ul style="list-style-type: none"> Bachelors degree in Business, Accounting or Finance (AF, I)
Experience	<ul style="list-style-type: none"> Experience of managing financial planning in either a school or relevant organisation (AF, I) Experience of staff management, including evidence of achieving performance improvement across diverse teams (AF) Experience of effectively managing a multi-million pound budget (AF, I) Experience of using Accounting Software to set and monitor budgets and prepare financial reports Experience of interpreting Government education policy and legislation (AF, I) 	<ul style="list-style-type: none"> Experience in an educational environment (AF, I) Track record of successful income generation and leadership of fund and profile raising activities (AF, I) Experience of acting as a responsible accounting officer or company secretary (AF, I) Experience in managing large contracts (AF, I) Experience with staffing processes and general human resources procedures (AF, I) Experience in managing and enforcing SLA and contracts for outsourced services (AF, I)
Knowledge and Understanding	<ul style="list-style-type: none"> Financial management processes and systems (AF, I) Financial requirements within publicly funded education and regulatory requirements (AF, I) understanding of personnel procedures and relevant employment legislation (AF, I) Data protection and issues or confidentiality (AF, I) Equality and diversity and how it applies to this job and the Academy (AF, I) 	<ul style="list-style-type: none"> Knowledge of financial modelling (using Excel) and cost analysis techniques (AF, I) Company and charity law, particularly governance, accounting and reporting requirements (AF, I)
Abilities and Skills	<ul style="list-style-type: none"> Ability to analyse data and plan an appropriate course of action for improvement (I, R) Ability to review systems to ensure the robust evaluation of performance and actions to secure improvements (I, R) Excellent organisational, communicating and problem-solving skills, with the ability to use own initiative and work proactively both in a team and independently (AF, I, R) Lead and manage teams to successfully achieve agreed goals (AF, I, R) 	<ul style="list-style-type: none"> Demonstrate persistence in overcoming and removing obstacles to goal achievement (I, R) Demonstrate a drive, commitment and sense of urgency that inspires others to achieve results (I, R) Implements and monitors relevant work procedures in line with defined standards (I, R) Proactively approaches others with a view to engaging in dialogue and building strong working relationships (I, R)

	<ul style="list-style-type: none"> • Be an effective team player that works collaboratively and effectively with others (I, R) • Ability to inspire, challenge, motivate and empower others (I, R) • Ability to think creatively to anticipate and solve problems (I, R) • Ability to think strategically and contribute to creating a coherent department vision (I, R) • Ability to manage and resolve conflict (I, R) • Ability to work under pressure, maintaining a sense of perspective (I, R) • Ability to manage own time effectively (I, R) • Excellent communication and presentation skills (I, R) 	<ul style="list-style-type: none"> • Recognises people who may be of critical importance to achievement of one's objectives and involves them to get their input (I, R) • Requests input from others to work towards a more effective outcome (I, R) • Holds employees/colleagues accountable for achieving results and publicly acknowledges effective performance (I, R) • Likes to multitask (I, R) • Demonstrates good judgement; approachable and professional; solid problem-solving skills; self-motivated; well organised (I, R)
Personal Attributes	<ul style="list-style-type: none"> • Confident in leadership role (I, R) • Ability to work as both part of a team and independently (I, R) • Committed to protecting the welfare of pupils (AF, I) • Committed to contributing to the wider school and its community (AF, I) • Resilient (I, R) • Reliable (I, R) • Committed (I, R) • Honest (I, R) • Trustworthy (I, R) • Dedicated (I, R) • Patient (I, R) • Loyal (I, R) • Good sense of humour (I, R) • High expectations of self and others (I, R) • Capable of handling a demanding workload and successfully prioritising work (I, R) 	
Other Factors	<ul style="list-style-type: none"> • Good attendance record (R) • Outstanding references (R) • A commitment to high educational standards, which maximise the achievements of all pupils (I, R) • A commitment to equality of opportunity for all pupils (I, R) • A belief in working in partnership and as part of an established team (I, R) • A commitment to continuous professional development (I, R) • A willingness to reflect upon experiences in a critical and constructive manner (I, R) • Police clearance (DBS check) 	

Evidence Key: (AF) Application Form (I) Interview
(R) References