



# St Joseph

Catholic Multi Academy Trust

## JOB DESCRIPTION and PERSON SPECIFICATION

<b>Job Title:</b>	School Business Manager	<b>Grade:</b>	SCP 17-24
<b>Area/Section:</b>	Holy Family Catholic Academy	<b>Salary:</b>	£28,770 to £33,024 per annum, pro-rata (£17,262 to £19,814 actual)
<b>Date Prepared:</b>	October 2024	<b>Hours:</b>	3 days / 22.2 hours per week
<b>Evaluation Date:</b>	November 2023	<b>Contract:</b>	All year round

### Role Purpose

As School Business Manager you will be a valued and important member of the Senior Leadership Team within the Academy and will contribute professionally to the administrative aspects of the Academy. You will be required to contribute to the overall organisation of the Academy and the Trust including involvement in Trust wide projects and initiatives.

You will be responsible for following financial procedures, budget monitoring, HR processes and other academy operations such as estates and ICT. You will carry out a range of duties which will include the direct line management of administrative and site staff.

### Role Summary

- The School Business Manager promotes the highest standards for business ethos within administrative function of the Academy and ensures the most effective use of resources in support of the Academy's learning objectives.
- To ensure the efficient use of all facilities on the site.
- To advise the SLT on business matters to the successful and effective operation of the Academy in meeting its educational aims.

### Key Responsibilities and Accountabilities

#### Finance

Under the direction of the Trust Central Finance team:

- Maintain the budget(s) within the Academy.
- Ensure compliance with financial regulations determined by the Trust.
- Support the delivery of staff training and development to ensure the school follows the effective use of financial systems and procedures.
- Process and correctly authorise of all invoices for expenditure and income collection, and allocation of income, in accordance with payment timescales and Trust procedures.
- Assist with the preparation, setting and monitoring of the local budget for the next 3 years which includes trends, applying central assumptions and potential over and under spends.
- Provide reports to SLT and Central Finance teams for discussion based on staffing needs, and any known changes, and with the Headteacher, undertake ICFP in order to set a viable budget which meets the needs of the Academy.
- Monitor the school budget on a monthly basis, running budget monitoring reports and variance analysis for the school and present to SLT; propose virements for approval to SLT and the Central Finance Team.
- Present benchmarking financial data to the Leadership team and investigate any variances.



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- Support procurements, ensuring a specification is drafted, the Trust Procurement Policy is adhered to and value for money is obtained.
- Pursue sources of funding, sponsorship and grants, to write bids on behalf of the Academy and wider Trust to secure funds as required.
- Support the audit by the effective management of information to comply with all audit requirements and supplying the required information in a timely manner.
- Ensure any audit recommendations are implemented.
- Ensuring that the Trust Financial Management Policy and other finance-related policies are adhered to in the school and that central finance are notified of any non-adherence.
- Remind staff regularly at staff meetings/via circulars of the need to adhere to such policies and of the requirement of the Academies Financial Handbook.
- Ensure that the school contracts register is fully complete and contemporaneous with copies of contracts. Liaising with the Trust Central Finance team prior to contract notice periods to ensure that any relevant Trust wide procurement can take place.

## Administration

- Lead the school administrative function, ensuring there are appropriate and relevant administrative systems in place to support the school in its aims and goals.
- Support local systems and processes to ensure that they are managed in the most efficient manner. Particularly with regard to processes that cross functional boundaries.
- Ensure that staff census data is completed and returned within the predetermined deadlines.
- With the Headteacher, develop and implement effective academy procedures and local academy policy reviews.
- Ensure that documents, policies and procedures are in the Trust format and made available to all necessary staff via the appropriate system.
- Attendance at relevant meetings as directed by the Headteacher or Central Team.

## Estates, Health and Safety and Risk Management

Under the direction of the Trust Central Estates Team:

- Support the Academy Capital Plan, ensuring that capital projects are identified and added to the Plan using Trust processes.
- Support the site-based projects, initiating and evaluating capital expenditure tenders and ensuring best value.
- Monitor, assess and review contractual obligations for outsourced school services and dealing with tendering processes for school contracts.
- Support the overall management and maintenance of the building, facilities, grounds and fabric and furnishings of the school, working with the site and premises staff and Headteacher.
- Working with the site and premises staff to ensure that estates compliance activities are reflective of all compliance activities at the site, including evacuations and that all activities are completed satisfactorily. Check with the site and premises staff on a regular basis that tasks are booked in as needed.
- Undertake relevant H&S training including asbestos, fire safety, legionella awareness, Emergency Planning, manual handling etc. Advise site/central staff of any issues.
- Oversee and ensure that the Emergency Plan/BCP is up to date, shared and tested with relevant staff on a regular basis.



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- Responsible for ensuring that all H&S procedures are updated regularly in the Trust format and shared with staff.
- Ensure school risk assessments are in place and appropriate to manage risks. Ensure these are shared with staff/parents/students and visitors as appropriate.
- Maintain the school risk register, update monthly and share with SLT, ensuring that all risks are captured and documented, and mitigations are put in place.
- Ensure that school staff training is H&S compliant, maintaining a record of all training on SmartLog and ensuring reminders are sent and followed up.
- Ensure that sufficient first aiders and fire wardens are in place and that relevant training is undertaken, as required.
- Support the catering, cleaning and IT operations in the setting and report back any issues to the Central Team.

## **Management Information, ICT Systems & Asset Management**

- Update, maintain and monitor systems including Arbor and compliance systems.
- Support the management and maintenance of inventories and records of all school resources and ensure that staff comply with recognised procedures. This includes ensuring that school assets are effectively and safely managed, keeping accurate and detailed records of all assets, asset tagging them and ensuring that staff sign for them and are aware of their responsibilities (this is particularly pertinent for school IT and telephone equipment).
- Support the security, monitoring and control of access to systems.
- Provide guidance, advice and support to the Headteacher, SLT and other Academy staff on the process and use of all data management systems ensuring that the data is effectively managed in line with Trust policy.

## **Staff Management/HR and Onboarding**

Under the direction of the Trust Central People Team:

- Line manage Academy Business Support staff which includes the allocation and coordination of work, staff development and staff training.
- Ensure there is an effective administrative staff structure in place to meet the Academy development requirements, identifying any training and development needs of staff.
- To proactively identify and contribute towards the management of staffing issues such as sickness and other absences such as maternity or leave of absence, in line with Trust policy and procedure and to play an active part in assisting other line managers in the Academy to address such issues.
- Oversee the communication of HR processes and HR record keeping in school via Trust systems, ensuring that all HR policies are complied with.
- Be proactive with the management of sickness capability, disciplinary and probationary procedures, informing central HR when triggers are hit or concerning patterns or behaviours emerge.
- Ensure all Return-to-Work interviews with all staff are completed following an absence of more than one day (and carrying these out where appropriate and directed to do so), ensuring any triggers are actioned.
- Ensure that all roles are recruited to by following safer recruitment guidance, and that staff undertake statutory safeguarding training.
- Ensure all staff have a clear understanding of the policies and procedures and they carry out their duties in line with these policies and procedures.



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- Work closely with the HR team in relation to recruitment and induction processes, ensuring that there are appropriate and relevant administrative systems in place to support the Academy in its aims and goals.
- With line managers, manage the implementation of effective induction processes for all staff, including support staff probations; supporting line managers with procedure.
- Maintain the Academy Single Central Record and Training Matrix and notify the DSL of any issues.
- Process any staff absence insurance claims in a timely manner.
- Input payroll on a monthly basis and ensure a knowledge of payroll processes, contracts and policies to effectively review payroll reports and challenge any discrepancies, in line with relevant pay and conditions documents.
- Ensure all changes in relation to payroll are carried out and processed in a timely manner.

## Governance and Data Protection

- Support the Trust Central Governance Team to ensure GIAS and Governor records are kept up to date.
- Under the direction of the Trust Central Governance Team, support the introduction of new Governors including references requests, DBS checks, ICT access, DfE checks and training (internal and external).
- Ensure that the school is compliant with GDPR and liaise with the Trust DPO as necessary.
- Act as the first point of contact for staff with any concerns in relation to subject access requests, data breaches or other GDPR related concerns and signpost to the DPO where necessary.
- Ensure that records are maintained and disposed of in accordance with retention policies.
- Contribute to the development of school and Trust wide policies and ensure that they are disseminated at staff meetings.

## General Responsibilities

- Follow all Trust policies and procedures relating to legislative and statutory requirements, including on Health and Safety and Safeguarding, including those required by Company education and charity law, Data Protection, and funding agreements.
- To participate in performance and development review process, taking personal responsibility for identification of learning, development and training opportunities in discussion with the line manager.
- To be aware of and support difference and ensure equal opportunities for all.
- To attend meetings within the trust and external events as required.
- To maintain constructive relationships and communicate with other agencies/professionals/parents and pupils.
- To recognise own strengths and areas of expertise and use these to support others.
- To maintain confidentiality always in respect of school-related matters and to prevent disclosure of confidential and sensitive information.
- Promote a safe and healthy environment for pupils, staff and visitors.
- Other duties commensurate with the grade of the post as directed by the Trust CFOO.



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The above principal accountabilities are not exhaustive and may vary without changing the character of the job or level of responsibility. The postholder must be flexible to ensure the operational needs of the Trust and Academies are met. This includes the undertaking of duties of a similar nature and responsibility as and when required, throughout the various workplaces in the Trust.



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## PERSON SPECIFICATION

The information listed as essential (the column that is shaded) is used as part of the job evaluation process. The requirements identified as desirable are used for recruitment purposes only.

	Essential	Desirable
<b>1. Qualifications and Training</b>		
GCSEs (A*-C/5 or above) in Maths and English or equivalent OR relevant qualification at level 2 (or equivalent)	✓	
Relevant school business/administrative qualifications e.g. Certificate in School Business Management		✓
A relevant professional management qualification		✓
Willingness to work towards relevant school-related qualifications as appropriate	✓	
Training in systems implemented by school	✓	
<b>2. Experience</b>		
Extensive experience using financial systems, processes and procedures	✓	
Experience of successfully applying for grants and good grant writing skills.		✓
Line management experience with teams and individuals.	✓	
Experience in payroll input and reconciliation	✓	
Advising and supporting management on financial matters	✓	
Experience carrying out financial reporting and seeking best value	✓	
Experience in business administration using relevant systems, processes and procedures	✓	
Experience of monitoring budgets effectively, understanding financial information and ensuring financial propriety in the context of current legislation & best practice	✓	
Successful leadership and management within a school office/educational environment		✓
Experience of project management		✓
Experience using Access Finance		✓
Experience managing school finances, carrying out financial reporting and seeking best value		✓
Grant funding applications		✓
HR processes and procedures, staff recruitment & induction		✓
Managing Health & Safety in the workplace		✓
<b>3. Knowledge and Skills</b>		
Able to influence decision making within a large organisation	✓	
Knowledge/understanding of regulatory and legislative requirements in relation to finance, administration and HR	✓	
Able to deliver and drive forward value for money initiatives	✓	
Able to deliver services and systems applicable for effective financial and administrative management	✓	
Knowledge of financial procedures, regulations and business management (including HR)	✓	



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	Essential	Desirable
Knowledge of child protection procedures and safeguarding including the principles of safer recruitment and the requirements of the Single Central Record		✓
Understanding of school admission procedures and policies		✓
Knowledge of Microsoft Office packages (Excel and Word)		✓
Knowledge of the requirements of DfE statutory data returns		✓
Knowledge of school-based financial management systems		✓
Knowledge of school funding, income and expenditure streams and their administration e.g. free school meals		✓
Awareness of the role of Health & Safety in schools		✓
<b>4. Professional and Personal Qualities</b>		
Belief that every student should have access to an excellent education regardless of background.	✓	
A commitment to the Trust's core purpose around giving children the best possible Catholic education	✓	
A commitment to supporting the Catholic ethos of the Trust	✓	
Willingness and commitment to Professional Development	✓	
To have excellent attendance and punctuality	✓	
Ability to persuade, motivate, negotiate and influence	✓	
Ability to self-evaluate learning needs and actively seek learning opportunities	✓	
Commitment to high educational, professional and personal standards, acting with integrity and honesty to safeguard the financial probity and reputation of the school	✓	
Understanding of promoting positive relationships with the wider school community	✓	
Thinks and acts strategically by reflecting and analysing and making sound ethical judgements	✓	
Works to high levels of accuracy	✓	
Pursues a shared vision with enthusiasm and determination	✓	
Willingness to continually improve own and team performance	✓	
Effective communication skills – both written and verbal	✓	
Ability to communicate a vision and inspire others	✓	
Commitment to ensuring the best outcomes for all pupils.	✓	
Empathy and respect for children, parents and their needs	✓	
A calm manner and a good sense of humour	✓	
Approachable, committed and resourceful	✓	
Able to manage stressful and challenging situations	✓	
Professional appearance and presentation	✓	
Prepared to work flexibly and adapt to changing needs	✓	
Fairness, empathy and listening skills	✓	
Integrity, confidentiality and discretion	✓	
Tenacity and the ability to work effectively under pressure	✓	
Proven capacity to work innovatively and independently	✓	





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**The requirements listed below are not considered during the job evaluation process, but are essential requirements for the role that will be assessed during the recruitment process.**

<b>Disclosure of Criminal Record:</b>			
	The successful candidate's appointment will be subject to the Trust obtaining a satisfactory Enhanced and Barring List Disclosure from the Disclosure and Barring Service (if ticked as an essential requirement).	✓	
	If the post-holder requires a DBS disclosure the candidate is required to declare full details of everything on their criminal record.	✓	
	If the post-holder does not require a DBS disclosure the candidate is required to declare unspent convictions only.		N/A
<b>The employment checks are required:</b>			
	Evidence of entitlement to work in the U.K.	✓	
	Evidence of essential qualifications – section 1 of PS	✓	
	Two satisfactory references	✓	
	Confirmation of medical fitness for employment	✓	
	Registration with appropriate bodies (where applicable)	✓	