



## Phoenix Values

**C**ommunity | **R**espect | **E**ngagement | **A**spiration | **T**rust | **E**quality

# JOB DESCRIPTION

## SCHOOL BUSINESS MANAGER

*At Phoenix the education of our students is our first concern. All staff are accountable for achieving the highest possible standards in work and conduct. Staff are expected to act with honesty and integrity; have strong subject knowledge, keep their knowledge and skills up to date and be self-critical; forge positive professional relationships; and work with parents in the best interest of our students.*

**GRADE: LPO7 OR LPO8 - FINAL SALARY SCALE TBC SUBJECT TO EXPERIENCE AND REVIEW**

**FULL TIME 52 WEEKS, 35 HOURS PER WEEK**

**FLEXIBILITY IN WORKING HOURS IS EXPECTED TO MEET THE NEEDS OF THE SCHOOL**

**THE POSTHOLDER WILL BE EXPECTED TO TAKE THEIR ANNUAL LEAVE ENTITLEMENT DURING THE SCHOOL HOLIDAYS**

**RESPONSIBLE TO: EXECUTIVE HEADTEACHER**

### **PURPOSE OF THE JOB**

The School Business Manager at Phoenix plays a pivotal strategic role in driving innovation, financial sustainability, and operational excellence across the whole school community. With adaptive leadership, this role ensures that Phoenix continues to make a difference where it really matters.

The School Business Manager is the leading support staff, and works as part of the Senior Leadership Team to assist the Executive Headteacher in their duty to ensure that the school meets its educational aims.

The School Business Manager is responsible for providing professional leadership and management of all school administrative support staff and enhance their effectiveness in order to achieve improved standards of operational and strategic management.

The School Business Manager promotes the highest standards of business ethos within the administrative function of the school and strategically ensures the most effective use of resources.

The main areas of responsibility for The School Business Manager are:

1. School Office, Administration, Financial Planning, Budgeting and Administration, PFI and Site Management, Catering Services, IT, H&S and Premises strategic direction.
2. Financial Resource Management – Emphasising sustainable growth, income generation, and value optimisation for the school including all financial operations and compliance.
3. Administration Management – Focused on operational excellence, data-driven improvement, and efficiency across the whole school community.
4. Management Information and ICT / Human Resource Management – Evolved to champion talent development, wellbeing, and organisational culture.

5. Facility & Property Management – Highlighting sustainability, compliance, and community partnership / Health & Safety – Integrated within strategic risk management and wellbeing leadership.
6. The School Business Manager should demonstrate strong business acumen proactively reviewing and updating existing systems and identifying innovative business opportunities to generate sustainable income for the school.

**LEADERSHIP & STRATEGIC MANAGEMENT** – Strengthened to drive adaptability, business growth, and future readiness

- Attend Senior Leadership meetings, full Governing Body and Resource Committee meetings as appropriate and directed by the Executive Headteacher.
- Negotiate and influence strategic decision making within the Senior Leadership Team
- In the absence of the Executive Headteacher, take delegated responsibility for Financial and other decisions, and working in close partnership with the Deputy Headteachers.
- Plan and manage change in accordance with the School Development Plan.
- As a senior leadership role, some flexibility in working hours is expected to meet the needs of the school and annual leave taken during school holidays.

**FINANCIAL RESOURCE MANAGEMENT** – Emphasising sustainable growth, income generation, and value optimisation

- Maintain a strategic financial plan that will indicate the trends and requirements of the school development plan and will forecast future year budgets.
- Evaluate information and consult with the Senior Leadership Team and Governors to prepare a realistic and balanced budget for the whole school community.
- Submit the proposed budget to the Executive Headteacher and Governors for approval and assist the overall financial planning process.
- Use the agreed budget to actively monitor and control performance to achieve value for money.
- Identify and inform the Executive Headteacher and Governors of the causes of significant variance and take prompt corrective action proposing any further revisions to the budget.
- Provide ongoing budgetary information to relevant people.
- Identify additional finance required to fund the school's proposed activities.
- Seek and make use of specialist financial expertise.
- Maximise income through lettings and other activities.
- 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.

**ADMINISTRATION MANAGEMENT** – Focused on operational excellence, data-driven improvement, and efficiency

- Manage the whole school administrative function and work collaboratively with the Deputy Schools Business Manager to manage the Office administration team.
- Design and maintain administrative systems that deliver outcomes.
- Update and manage systems that link processes and interact across the school to form complete systems.

- Define clear roles and responsibilities, information and support for all administrative support staff.
- 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, LA and other agencies and stakeholders within statutory guidelines.
- Have oversight of the school's GDPR compliance, ensuring data protection responsibilities are met across all administrative functions.
- Work collaboratively with the school's GDPR Officer to ensure data protection compliance across all administrative and digital systems.

#### **MANAGEMENT INFORMATION SYSTEMS & ICT** – Redefined for digital innovation and strategic technology alignment

- Consider approaches for existing use and future plans to introduce or discard technology in the school in collaboration with the IT team.
- Consult with relevant teams to introduce new technology, update or improve existing technology for different administration purposes.
- Ensure that the school has a strategy for using technology aligned to the overall vision and plans for the school ensuring value for money.
- Communicate the strategy and relevant policies, including Data Protection for use of technology across the school.
- Establish systems to monitor and report on the performance of technology within the school.
- Ensure contingency plans are in place in the case of technology failure.
- Collaborate with the Data Manager to ensure data collection systems provide information to stakeholders and are streamlined to maximise efficiency of the data supplied.
- Ensure the management and oversight of the school website and associated digital communications, delegating appropriately to the IT department.

#### **HUMAN RESOURCE MANAGEMENT** – Evolved to champion talent development, wellbeing, and organisational culture

- Manage the external payroll services for all staff including the management of pension schemes and associated services.
- Ensure oversight of all statutory school policies, guaranteeing that the policy administrator tracks and monitors compliance periodically, and that these policies are clearly communicated to all 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.

- Collaborate with the Policy Administrator to ensure that all statutory policies and procedures comply.
- Manage recruitment, performance management, appraisal and development for all administrative staff.
- Monitor the relevant legal, regulatory, ethical and social requirements and the effect they have on your school and staff.
- Work with the Deputy Schools Business Manager to manage the HR systems and structures to ensure consistency. Seek and make use of external specialist expertise in relation to HR issues where necessary.
- 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 activity.
- Undertake absence review meetings in line with the schools sickness absence policy and within the Senior Leadership team.

#### **FACILITY & PROPERTY MANAGEMENT** – Highlighting sustainability, compliance, and community partnership

- 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.
- Ensure the stakeholders and PFI managers are responsible for the building maintenance of sites ensuring compliance and appropriate Maintenance and Services are in place and routinely reviewed.
- Routinely review SLA contracts and compliance services with the Facilities Manager and Deputy Schools Business Manager and Executive Headteacher.
- Ensure the continuing availability of utilities, site services and equipment and manage the transition from PFI alongside the Facilities Manager and Deputy Schools Business Manager.
- Follow sound practices in estate management in liaison with the PFI contracts manager and grounds and playgrounds 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, IT are routinely reviewed, monitored and managed effectively.
- Oversight of the letting of school premises to external organisations, for the development of the extended services and local community requirements, working.
- Seek professional advice on insurance and advise the SLT on appropriate insurances for the school and implement and manage such schemes accordingly.
- The School Business Manager will actively review and renegotiate premises and service contracts post-PFI to ensure best value, sustainability, and alignment with the school's long-term strategic objectives with the support of the Facilities Manager and Deputy Schools Business Manager.

#### **HEALTH & SAFETY** – Integrated within strategic risk management and wellbeing leadership

- Have oversight of Health & Safety across site delegating to Facilities Manager for site H&S, Compliance and Fire Risk Assessment and Fire Safety.

- 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 Team, Governors and where appropriate the Health & Safety Executive.
- Ensure the maximum level of security consistent with the ethos of the school.
- Oversee statutory obligations are being met for pupils with special educational needs, ensuring that financial and supporting agency services are adequate for their diverse needs.

### **CONDITIONS OF SERVICE**

Governed by the National Agreement on Pay and Conditions of service, supplemented by local conditions as agreed by the Governors.

### **ADDITIONAL RESPONSIBILITIES AND GENERAL REQUIREMENTS:**

- Undertaking any professional duties commensurate with the grade of the post, reasonably delegated by the Executive Headteacher or as reviewed by the Governing Board.
- Participating in the school's appraisal and professional development arrangements, ensuring that objectives are set and met within the agreed time-scale.
- Attending and participating in relevant training (including training and development days), sharing the knowledge and ideas gained with colleagues.

### **VARIATION CLAUSE:**

1. This is a description of the job as it is constituted at the date shown. It is the practice of the school to periodically examine job descriptions, update them and ensure that they relate to the job performed, or to incorporate any proposed changes. This procedure will be conducted by the Executive Headteacher in consultation with the Post Holder.
2. In these circumstances it will be the aim to reach agreement on reasonable changes, but if agreement is not possible management reserves the right to make changes to the job description following consultation.

### **FLEXIBILITY CLAUSE:**

1. Other duties and responsibilities express and implied which arise from the nature and character of the post within the school mentioned above or in a comparable post in any of the school's other sections or departments.
2. Staff are expected to comply with any reasonable request Executive Headteacher to undertake work of a similar level that is not specified in this job description.

### **EQUAL OPPORTUNITIES STATEMENT**

To ensure equality of opportunity for all people in service provision and in employment, and to oppose strongly any form of discrimination.

### **SAFEGUARDING**

Phoenix is committed to the safeguarding and welfare of our children and young people and expects all our staff and volunteers to share this commitment.



# PERSON SPECIFICATION

**JOB TITLE:** SCHOOL BUSINESS MANAGER (SBM)  
**GRADE:** LPO7 OR LPO8 - FINAL SALARY SCALE TBC SUBJECT TO EXPERIENCE AND REVIEW  
FULL TIME 52 WEEKS, 35 HOURS PER WEEK  
THE POSTHOLDER WILL BE EXPECTED TO TAKE THEIR ANNUAL LEAVE ENTITLEMENT DURING THE SCHOOL HOLIDAYS.  
**RESPONSIBLE TO:** EXECUTIVE HEADTEACHER

All post holders are expected to demonstrate a commitment to Equal Opportunities, a proven ability to work effectively in culturally, and linguistically diverse environments

**PLEASE ADDRESS EACH OF THE FOLLOWING AREAS IN YOUR PERSONAL STATEMENT**

## TRAINING AND QUALIFICATIONS:

Criteria	Essential	Desirable
Recognised management, business, or accountancy degree or equivalent professional qualification (e.g. CIMA, ACA, ACCA, DSBM, CSBM, ADSBM, MSc School Business Management).	✓	
Evidence of Continuing Professional Development.		✓
Membership, or eligibility for membership, of the Institute of School Business Leadership (ISBL) or another relevant professional body.		✓

## EXPERIENCE AND EVIDENCE:

Criteria	Essential	Desirable
Leading strategic financial planning, budget management, and reporting within an educational or comparable public sector environment.	✓	
Managing change projects, operational systems, and compliance processes. Particularly with PFI contracts and post PFI		✓
Senior leadership experience with responsibility for finance, operations, HR, ICT, and premises management.	✓	
Experience of working with governance structures, including reporting to SLT and Governors.	✓	
Leading and developing staff teams in a professional environment.	✓	

## KNOWLEDGE AND UNDERSTANDING:

Criteria	Essential	Desirable
Sound knowledge of school finance systems, statutory financial regulations, and compliance requirements.	✓	
Knowledge of operational management, including HR, premises, health & safety, and ICT.	✓	

Awareness of safeguarding and safer recruitment procedures.		✓
Understanding of value-for-money initiatives and financial benchmarking.		✓
Ability to lead teams and influence decision-making strategically across the school.	✓	
Understanding of the wider educational and regulatory context, including local and national frameworks.		✓

#### SKILLS AND ABILITY:

Criteria	Essential	Desirable
Strong financial analysis, forecasting, and budget management skills.	✓	
Excellent strategic planning, organisational, and project management abilities.	✓	
Ability to produce high-quality financial management accounts, reports, and recommendations for SLT and Governors.	✓	
Proficiency in financial and operational management systems e.g. Arbor Finance, PS financials and Microsoft Office, HCSS Access Education.	✓	
Strong interpersonal, communication, and influencing skills, able to collaborate with staff, leadership, and stakeholders.	✓	
Ability to work under pressure, prioritise tasks, and meet deadlines effectively.	✓	
Problem-solving and decision-making skills with attention to detail and accuracy.	✓	

#### PERSONAL QUALITIES:

Criteria	Essential	Desirable
High professional integrity and confidentiality.	✓	
Proactive, self-motivated, and solution-focused.		✓
Adaptable, resilient, and able to manage competing priorities.	✓	
Committed to promoting a positive, inclusive, and supportive school culture.	✓	
Willingness to constructively challenge and support teams to continuously improve performance.	✓	

The Governing Body of the school is committed to safeguarding and promoting the welfare of children, young people, and staff and the Executive Headteacher must ensure that the highest priority is given to following all safeguarding guidance and regulations. The successful candidate will require an enhanced DBS clearance. We are dedicated to equality and valuing diversity. To ensure equality of opportunity for all people in service provision and in employment, and to oppose strongly any form of discrimination.