

**Job Description**

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|  | School Business Manager | | | | School | Roberts Primary School |
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| Post Number |  | | | |  |  |
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| Grade | 8-10 | Salary | Grade 8 SCP 24-27 37 hours, 41 weeks/year | |  |  |
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| Reports To | Head teacher |
|  | Carl Watkins |

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| **Purpose of the Job** |
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| * To be responsible for the business and financial management of school resources including   budget/financial planning and providing accurate financial reports to SLT, Governing Body  and external bodies.   * To be responsible for providing professional leadership and management of school support   staff, to enhance their effectiveness in order to achieve improved standards of learning and  achievement in the school.   * 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 in support of the school’s learning objectives.   * The School Business Manager is responsible for the Financial Resource   Management/Administration Management/Human Resource Management/Facility &  Property Management/ Operations Management of the School.   * Provide confidential secretarial and administrative support to the Head Teacher and School   Leadership Team   * To support and advise the Head teacher and Governing Body on all operational areas cited   Above |

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| **Main Activities** | | |
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| **Leadership & Strategy**   * To assist, when required, the senior leadership team (SLT) in providing appropriate   expertise in relation to finance, business, personnel and facilities management.   * To take responsibility for the establishment and maintenance of all business procedures   and protocols in relation to the Financial Management Standard In Schools   * To monitor and evaluate the areas for which responsibility is held and to report appropriately to the Head teacher and Governing Body * Represent the Head teacher at relevant meetings * Actively support school events and promote a positive ethos around the schools.   **Financial Resource Management**   * Working with the Head, the School Business Manager will prepare an annual budget for the   school to be submitted to the Governing Body and will provide specific expertise in long-term financial management. The school buys into the Traded Services for Accountancy Services; this level includes professional advice and allows the school to have access to the corporate financial system. The School Business Manager will be responsible specifically for:   * Ensuring the school has appropriate financial systems and managing all aspects of the school’s financial systems (including voluntary funds such as School Fund and special project accounts) in accordance with agreed policies and timetable; ensuring accurate financial records are maintained and reporting on a regular basis to the Head Teacher and Governors. * Manage and administer the school budgets and their related cheque book bank accounts in line with LA and audit guidelines. Work in partnership with Dudley LA on budget monitoring and overall financial management. Contribute to budget setting with Head teacher. Monitor and evaluate expenditure and income, investing funds to accumulate interest, preparation of cash flow projections, control the collection, banking and disbursement of all official funding, identification of potential areas of concern for effective budget control and raising necessary virements and financial year end procedures for closedown and preparation for new year budget. * Evaluate information and consult with the Senior Leadership Team and Governors to prepare a realistic and balanced budget. * Submit the proposed budget to Governors for approval and assist in the final financial planning process. * Present final budget to full Governors. * Manage and collate statistical and financial information as may be necessary for the effective administration of the school budget, complete statutory LA returns and carry out termly budget monitoring with the schools budget officer (LA) * Lead and secure best value and ensure its implementation in all areas of purchasing. * Provide regular financial reports to Finance Committee including spend to date, projected spend to the end of the financial year identifying and informing of any variance along with corrective action along with data on Reserves, Devolved Capital, additional income and Standards Funds. * Using a formula calculate annual Faculty budget taking into account their ‘essential needs’ and work with the Head Teacher to delegate capitation budgets to them. * Provide budget monitoring reports to Faculty Coordinators/Budget holders * Authorised person on Agresso system. * Monitor staff salary on a monthly basis taking action where differences or miscodes are investigated. * Authorised signature on all school budgets including all adjustments to pay. * Direct input of data on PSE HR and Payroll system, to enter car mileage, lunchtime duties and any other additional claims directly onto payroll. * Raising of all school invoices and ensuring that debt collection takes place. * Monitor income due to school taking necessary action to follow up where necessary * To complete all financial returns to Financial Services. * Reconcile and authorise the Consistent Financial Reporting Return. * Lead regular benchmarking exercises with the schools budget officer by using the school’s annual consistent financial return data submitted to the Department of Education Value for Money site and report findings to Head teacher / Governing Body * To co-operate, initiate and manage audit procedures as necessary. * Adhere to the Financial Management Standard, working towards revised legislation in obtaining the School Financial Value Standard * Submit financial reports to the relevant bodies once grants have been awarded. * Managing the tendering for all service contracts; monitoring all insurance policies, with a view to cost effectiveness; and ensuring that the school maximizes its potential from the LA * Submitting capital/Asset Management Programme(AMP) bids to the LA, monitoring and control of capital expenditure on buildings and grounds, placing of contracts, appointment and monitoring of contractors * Maximise income through lettings and other activities, within agreed policies. * Monitor the standard and cost effectiveness of traded services. * Complete the traded services return annual for approval at full Governors. * Advise the Head Teacher and Governors if fraudulent activities are suspected or uncovered * Maintain a strategic financial plan that will indicate the trends and requirements of the school development plan and will forecast future year budgets * Identify additional finance required to fund the school’s proposed activities, writing and submitting bids where appropriate and advising others * Responsibility for providing information relating to service level agreements and leases to support the Governing Body in its decision making. * Responsibility for the completion and submission of the school Census and workforce Census and to provide advice and information to the Head teacher and GB on subsequent implications for the budget.   **Administration**  The School Business Manager will be responsible for those aspects of administration of the school, which do not relate to the teaching, supervision and pastoral care of students. Specific responsibilities include;   * Manage Administration team, including recruitment, performance management and development, welfare, discipline, etc., in accordance with Council policy, the Authority’s and the school’s procedures. Ensure an effective service, access and availability as appropriate. * Set standards to ensure an efficient, effective and quality service is provided * Monitor workload/ work life balance and ensure deadlines are met * Ensure management and financial information is provided as required * Determine the need for and arrange provisions, analysis and evaluation of data and details reports/information * Manage the school calendar and ensure appropriate communication to ensure its effectiveness * Provide relevant information for other organisations. * Prepare information for publications and returns for the DCFS, LA and other agencies and stakeholders within statutory guidelines. * Establish and use effective methods to review and improve administrative systems. * To ensure inventories of equipment and stock are maintained and reported annual to full Governors * Carry out monitoring of department forming part of whole school evaluation * Define responsibilities, information and support for staff and other stakeholders * 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 * Oversee organisation and management of the school Catering Unit ensuring this continues to operate within budget   **Facility and Property Management**  The School Business Manager will be responsible for the site and support team involved with the overall financial management and maintenance of the buildings, facilities, grounds, fabric and furnishings of the school, working with the Head Teacher. The school buys into the local authority’s traded service for building maintenance and cleaning and the School Business Manager takes a lead role in overseeing this service. Within school. Specific responsibilities include:   * Ensure the school premises adheres to relevant energy conservation requirements * Through regular contact with the premises staff ensuring the proper maintenance and repair of the school is carried out, and progress monitored * Ensuring the quality of all traded service contracts * To be responsible to the Head Teacher for the security, maintenance, heating, cleaning and other general site services within the premises. * To deal with all external agencies, delivering services to the school and to deal with all aspects of tendering to ensure that Best Value is achieved. * To be responsible for letting of the school premises to outside organisations and school staff, the development of all school facilities for out of school use, with particular reference to the local community. * Seek professional advice on insurance and ensure that all claims are actioned. * Ensure the continuing availability of utilities, site services and equipment * Ensure ancillary services e.g. catering, cleaning, etc., are monitored and managed effectively * Maintain records of insurance cover, copyright and other licences, etc. * Manage the school catering facility ensuring it operates within the Food Management Manual, within budget and meets with the appropriate nutritional standards. * Ensure the statutory maintenance of the premises and equipment is carried out in a timely fashion and any necessary work is carried out to ensure a safe environment   **Human Resource Management**  The School Business Manager working with the Head Teacher and appropriate Governor Committees will be responsible for   * To implement and maintain personnel policies as they apply within the school including: the recording, reporting and monitoring of staff attendance; the scrutiny and processing of employees claim forms, supply cover, travel, overtime and other expenses; work in conjunction with LA on issues related to payment and conditions of service; advertising, recruitment, selection process, interviews for staff, contract of employment. * To carry out responsibilities in line with the Council’s Equal Opportunity Policy * To carry out Line Management responsibility for identified staff including Performance Management * Ensure the schools policies are clearly communicated to all staff in school, including Equality Policy, E Safety Policy, Confidential Reporting Policy and Guidance for Safer Working Practice for Adults Who Work with Children and Young People * Monitor the way policies and procedures are actioned and provide support where necessary * Carry out necessary checks and to ensure that the single central register is up to date * Management of the Staff Absence Insurance Policy ensuring that the staff list is up to date and that all claims are actioned and monies received. * To identify appropriate professional development needs for relevant staff and explore cost effective ways in which they may be fulfilled   **Safeguarding**   * Work effectively with Designated Child Protection Person on ensuring safeguarding issues systems / communication robust, confidential and rigorous * Adhere to the safeguarding children procedures and LA policy. * To support the emotional health and well-being of staff and pupils in accordance with school policy * To establish a secure internal system to identify, communicate, record and monitor incidents To maintain confidentiality and observe data protection and associated guidelines as appropriate * To work collaboratively with LA and external agencies Line Management Responsibilities The School Business Manager will be responsible for managing all admin support staff Lunchtime Supervisors and Catering Staff. In the case of Technology, Technicians, Teaching Assistants, HLTA’s and Cover Supervisors the School Business Manager oversees the recruitment and appointment and is the point of contact for queries relating to salary and hours worked giving advice and support. * Motivating and facilitating teamwork and good practice in order to achieve excellent standards of service delivery. * Managing Staff Attendance and Leave to ensure a continuous service throughout the year. * Overseeing admin/premises support staff career development including the performance management and reviewing training requirements. * Monitoring the effectiveness of the admin/premises support staff establishment to meet the needs of the school. * Managing school catering unit, line management of staff   **This Job Description is not necessarily a comprehensive definition of the post. It will be reviewed at intervals and it may be subject to modification or amendment at any time after consultation with the holder of the post.** | | |
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| Special Conditions | This role is subject to an Enhanced DBS Check | |
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| Car Allowance | N/A | |
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| Prepared By  (Head teacher) | Carl Watkins | |
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| Review Date | September 2024 |

**Person Specification**



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| Post Number |  | | | |  |  | | | | |
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| Criteria (Essential) | | | | | | | Assessment By | | | |
|  | | | | | | |  | Application | Interview | Tests |
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| **Experience**  At least five years’ experience of working in finance and administration, including the use of ICT  Experience of using Microsoft Office applications e.g. word, excel, power point  Experience of budget planning and monitoring  A working knowledge of Agresso or similar systems  Experience of working in school admin environment  **Qualifications/Training**  Educated to GCSE Grade C in English & Maths (or equivalent  Qualification in either Finance / Accounts or CSBM / DSBM  NVQ level 3 or higher administration / finance (or equivalent)  **Knowledge, Skills and Abilities:**  A working knowledge of MS office and Integris (or similar MIS)  Competent in the use of IT packages  Thorough knowledge of administrative and finance processes  Confidence to review established workflow patterns and seek efficiency and improvement wherever possible  An understanding of the confines of confidential working e.g. Data protection  Knowledge of accounting procedures  Understanding of administration and financial school systems including SFVS.  Demonstrable ability to produce a good standard of written work e.g. response to correspondence, reports, minutes, use of spreadsheets  Willingness to attend supervisory skills training  Willingness to attend other training as identified as appropriate and / or required.  **Personal Qualities and Attributes**  A good attendance record.  Self-motivated and able to work deadlines    Able to work on own initiative and as an effective member of a team.  Attention to detail  Able to work accurately and calmly, even under pressure.  Able to work at a strategic level  Diplomatic and tactful  Able to support, influence and motivate others  A professional approach with absolute integrity and maturity to deal with sensitive issues on a highly confidential matter.  Ability to attend Governors meetings, as required | | | | | | |  | √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √ | √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √  √ | √ |
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| Prepared By | | Mr Carl Watkins | | | | | | | | |
| Date | | September 2024 | | | | | | | | |
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