



St Joseph

Catholic Multi Academy Trust

JOB DESCRIPTION and PERSON SPECIFICATION

Job Title:	School Business Manager	Grade:	SCP 45-50
Area/Section:	St Francis Xavier's Catholic Academy	Salary:	£53,577 to £59,161
Date Prepared:	April 2024	Hours:	37 hours per week
		Contract:	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, ICT 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.
- Ensure the Headteacher and Governing Body are kept abreast of all legislative changes and proposals that could affect the business, financial, HR and resources management of the School.
- Contribute to and demonstrate the overall ethos and aims of the School
- Lead all business support areas of the school including administration, premises management, HR, procurement, health and safety, information systems, marketing and fundraising.
- Play a critical role in supporting the Trust's CFOO to lead, be part of developing and improving the financial functions and working on trust wide finance projects.

Key Responsibilities and Accountabilities

Financial Management

Under the direction of the Trust Central Finance Team:

- Support in the development and delivery of the financial strategy for the school in support of strategic and operational plans
- Prepare for approval by the CFOO annual estimates of income and expenditure and monitor and report performance against budgets.
- Ensure that the school is compliant with the Academies Trust Handbook and the Trust's own policies.
- Lead school finance staff, managing the accounting function including day-to-day responsibility for financial operations including oversight of the month-end processes.
- Lead on all financial aspects of internal and external audits for the school



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- Lead the development and implementation of systems and procedures associated with financial activities, ensuring efficiency and value for money for the school.
- Provide detailed management accounts for the Governors and Head according to an agreed schedule, reporting immediately any exceptional variances.
- Provide regular management accounts to key stakeholders, including Governors, Headteacher and CFOO and report on the financial state of the school on at least a monthly basis.
- Prepare appraisals for particular projects, and develop a business plan and long-term financial strategy for the future development of the school.
- Advise on the impact of changes to national funding and opportunities for grants and other funding.
- Ensure financial viability of the School and provide sound financial advice to all stakeholders
- Take responsibility for the management of the school accounting function, ensuring its efficient operation according to agreed procedures. Review all accounting and financial regulations and procedures annually to ensure compliance with relevant legislation and other requirements, including the ESFA, the Archdiocese, the Local Authority, auditors and other relevant external bodies.
- Take responsibility for effective and appropriate procurement, including the ordering, processing and payment of all goods and services provided to the school, in line with the trust's policies
- Oversee the Finance Service Level Agreements and ensure correct treatment including securing annual income targets and delivering quality services.
- Maintain both the school assets register and the school risk register, and provide regular reports to the Governing Body and its committees, the Head and SLT
- Liaise with the CFOO in leading income generation opportunities including grants, bids and promoting shared services
- Develop the scope of the school's services, both in-house or outsourced, through price negotiations, development of SLAs and ongoing monitoring of service and compliance.
- To work with the Headteacher and the CFOO to provide information for strategic workforce planning.
- Attend relevant governors' meetings and present appropriate reports
- Use financial management information, especially benchmarking tools to identify areas of relative spend, assess trends and compare spending with similar schools. Advise the SLT and Governing Body accordingly.
- Monitor all accounting procedures and resolve any problems, including ordering, processing and payment for all goods and services provided to the school.

Health and Safety

- Act as the School's Health and Safety Co-coordinator and Fire Officer – with support and direction from the Headteacher and Trust Central Estates Team
- Deliver Health and Safety training annually to staff under the guidance of the Trust Central Estates Team
- Implement, co-ordinate and manage the administration of health and safety on behalf of the Headteacher with support of the Trust Central Estates Team (using Every)
- Manage the reporting and rectifying of Health and Safety issues on site (using Every)
- To liaise with the Trust Central Estates Team in the performance management and professional development of all School Staff relating to Health and Safety (using Safesmart)

Premises and Facilities Management

Under the direction of the Trust Central Estates Team:



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- The implementation and monitoring of building maintenance of the school site. This includes the preparation and implementation of maintenance schedules; the efficient operation of all facilities; including, installations and plant for Electric, Gas, Water etc. (using the Every system)
- Monitor and implement records of and initiate regular fire practices and alarm tests in line with statutory requirements. Ensure effective emergency procedures are in place and regularly reviewed, including Personal Emergency Evacuation Plans (PEEPs)
- Managing the Estate team who look after the security of the school site and the upkeep of the playing fields, gardens, all-weather pitch, land drainage & day to day repairs etc. Ensure the maintenance of boundaries, footpaths and roads using approved contractors.
- Continue to manage and grow the letting of the school premises and all school facilities for out-of-school use with particular reference to the local community.
- The purchase, repair and maintenance all furniture and fittings in line with agreed parameters
- Manage the provision of catering, cleaning and transport contractors
- Support contract management for bought in services.

Marketing and Development

- To support the development of a strategic plan for marketing and development to align with the strategic vision of the school and the Trust.
- Ensure marketing, development and public relations activities present the school accurately and favourably at local and national levels and within relevant professional communities.
- Create and implement marketing strategies to promote the school's programs, events, and achievements effectively.
- Oversee the creation and dissemination of marketing materials such as brochures, flyers, newsletters, and digital content to attract prospective students and parents.
- Manage the school's online presence, including its website, social media accounts, and online directories, ensuring they accurately reflect the school's brand and values.
- Plan and coordinate promotional events such as open events, information sessions, and community outreach programs to engage with prospective students and parents.
- Conduct market research to identify trends, competitors, and potential areas for growth, and use this information to refine marketing strategies and target audiences effectively.
- Cultivate relationships with local businesses, community organisations, and educational institutions to explore partnership opportunities that could enhance the school's visibility and reputation.
- Manage the school's public relations efforts by maintaining positive relationships with local media outlets, responding to inquiries, and proactively seeking opportunities for media coverage.

Management Information, ICT Systems & Asset Management

- To support the Trust's IT function in ensuring the School has a strategy for using technology aligned with the Trust's overall vision and plans for the school, ensuring value for money and effective outcomes.
- In conjunction with the Trust's IT function, ensure contingency plans are developed in the event of a system failure.
- to support the Trust's IT in ensuring the installation; maintenance and repair of all IT services within the school in liaison with the school network provider.
- To liaise with central IT for the purchase and maintain appropriate software and services for the administrative support of the School.
- Ensure accurate records are kept of all hardware, software and licences.
- Support the management and maintenance of inventories and records of all school resources and ensure that staff comply with recognised procedures. This includes ensuring



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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.
- 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).



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- 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.

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.



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
1. Qualifications and Training		
GCSEs (A*-C/5 or above) in Maths and English or equivalent OR relevant qualification at level 2 (or equivalent)	✓	
Educated to degree level or equivalent experience	✓	
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	✓	
2. Experience		
At least one year's experience at Senior Level in Education or in Financial Management, with a successful track record or substantial post-qualification professional experience (5 years+) in senior management within a school business management context	✓	
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	✓	
To be able generate income streams	✓	
To have a current knowledge of site maintenance and development issues and appropriate knowledge of Health and Safety requirements, while having a working understanding of risk assessment techniques.	✓	
Successful leadership and management within a school office/educational environment		✓
Successful track record of leading & managing complex projects from inception to completion	✓	
Experience of project management		✓
Experience using Access Finance		✓
Experience using Arbor		✓
Experience managing school finances, carrying out financial reporting and seeking best value		✓
HR processes and procedures, staff recruitment & induction	✓	



	Essential	Desirable
Managing Health & Safety in the workplace	✓	
3. Knowledge and Skills		
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)	✓	
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		✓
4. Professional and Personal Qualities		
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	✓	



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	Essential	Desirable
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	✓	

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.

Disclosure of Criminal Record:

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

The employment checks are required:

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)	✓	