

School Business Manager - Role Description

Position:	School Business Manager (SBM')
Location:	Charlton Wood Primary Academy
Salary:	N32-35 (£42,839 - £46,142 FTE)
Actual Salary:	£25,703 - £27,685
Contact:	Permanent
Working Pattern:	22.5 hours across 3 days, all year round
Reporting to:	Headteacher
Responsible for:	Business/Administration, Facilities, School Meal Supervisory Assistants

Job Purpose:

- To provide operational leadership and business management for schools identified as within the role portfolio.
- To lead on the integration and alignment of systems and processes in the school(s), ensuring effective management of people, finances and resources through coordinating site-based teams (including Assistant School Business Managers).
- The role involves being a key member of the School Leadership Teams (SLT) with additional Trust level matrix working with the Estates Manager and CFOO.
- The School Business Manager (SBM) is responsible for providing the professional leadership and management of school associate staff in partnership with teaching colleagues, to enhance their effectiveness and in order to achieve improved standards of learning and achievement in the schools within the scope of responsibility.
- The SBM will promote the highest standards of business ethos within the administrative function of the school and strategically ensure the most effective use of cross-school resources in support of the school's learning objectives.
- To be responsible for Finances, Premises, Facilities, Health and Safety, Income Generation, IT, Staffing and Administration (including trips), working within the Trust's structures and policies for all schools in the portfolio to support the prime activities of teaching and learning excellence.
- In partnership with the Trust Estates Manager, support large-scale facilities

projects in their geographic (north / south) area including grant and bid applications, and key liaison work with PFI contractors and LA officers as needed.

- The postholder will contribute to the development of school(s) strategic plans and work proactively towards the aims of the Trust.

General Responsibilities:

- Ensure that the school meets all the regulations laid down by legislation and the ESFA for areas of responsibility and keep abreast of new developments.
- Be an active member of the Trust’s SBM team, regularly attending meetings and sharing knowledge and information to ensure the trust meets its strategic aims.
- Have overall responsibility for line management and appraisal of support staff.
- Ensure that the administrative support for local school governance is carried out to a high standard.
- Be part of each SLT in the portfolio and work alongside the rest of the senior leadership team to support the good business management of each site.
- Lead projects and initiatives as directed by the headteacher or CFOO and
- Be an active and effective contributor to the school(s) and The Trust’s estate overall.
- Play a full and visible part in the life of the school communities, to support their distinctive vision and ethos and to encourage staff/students to follow this.
- Follow all school/trust policies.
- Work in a co-operative and polite manner with all stakeholders.
- Work with pupils/students in a courteous, positive, caring and responsible manner at all times
- Follow the child protection procedures so as to ensure that children’s safety and wellbeing is never compromised.
- Be polite, cooperative and positive when communicating with other staff.
- Take an active/positive role in the school’s commitment to the development of staff.
- Work with visitors to any school in such a way that it enhances the Trust’s reputation.
- Present oneself in a professional way that is consistent with the values and expectations of the Trust.

Financial and Resource Management

- Working closely with the Headteacher in the portfolio and SLT to develop and implement financial strategy and to carry out financial modelling allowing the Headteacher to make well- informed strategic decisions.
- Responsible for preparing and setting detailed budgets for the school and recommending the appropriate allocation of funds to meet the needs of the school annually and over the Trust’s budget cycle.
- Work within the Trust’s financial policies and protocols to ensure the school maintains a secure position.

- Manage the Finance functions in the school to ensure compliance with financial regulations and legislation as dictated by Amplify Education’s CFOO, and the DfE/EFA, working within the published systems, procedures and policies.
- Evaluate information and consult with the Senior Team and Local Governors to prepare a realistic and balanced budget for school activity.
- Discuss, negotiate and agree the final budget proposals with the Headteacher in the portfolio.
- Use the agreed budgets to actively monitor and control performance to achieve value for money.
- Identify and inform the Headteacher and CFOO of the causes of significant variance and take prompt corrective action, proposing proactive revisions to the budget(s) if necessary, in response to significant or unforeseen developments.
- Provide ongoing highly accurate budgetary information to relevant people.
- Advise the Headteacher and CFOO 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 and seek and make use of specialist financial expertise.
- Maximise income through lettings and other commercial activities.
- Present timely and fully costed proposals, recommendations or bids
- Monitor the effectiveness and implementation of agreements and actively support The Trust’s financial policy development.

Leadership and Strategy

- Attend Senior Management/Leadership Team, and Local Governing Body meetings on a planned and regular basis supporting all sites in the portfolio.
- Negotiate and influence strategic decision making within the school’s Senior Management/Leadership Teams as needed having regard for the good management of resources.
- In the absence of the Headteacher, take delegated responsibility for Financial and other decisions on partnership with the allied SLT and CFOO
- Plan and manage change in accordance with the school development/strategic plan, HR advice and other financial guidance available.
- Ensure there are processes and protocols in place to ensure the delegation of, or direct management of, all school support staff on, and across sites.

Facilities & Property Management

- Ensure the supervision of relevant planning and construction processes are 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 estates management and grounds maintenance.
- Monitor, assess and review contractual obligations for outsourced school services.
- Ensure a safe environment for the stakeholders of the school in order 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 in partnership with the Trust Estates Manager and CFOO
- Oversee the letting of school premises to external organisations, for the development of the extended services and local community requirements.

Risk Management

- Ensure that the school's risk register is maintained and up to date in line with the Trust's policy and procedures.
- Ensure that risks are recognised and mitigated, as far as possible, for all elements of the role.

Health, Safety and Compliance

- Act as the school's Health & Safety Coordinator and Fire Officer.
- Plan, instigate and maintain records of fire practices and alarm tests for all sites in the portfolio.
- Ensure each school's written health & safety processes are clearly communicated and available to all people.
- Enable regular consultation with school stakeholders on health and safety issues.
- Ensure effective use of Trust systems to enable the identification of hazards and prepare/ review associated risk assessments.
- Ensure systems are used for effective monitoring, measuring and reporting of health and safety issues to appropriate individuals and bodies.
- Ensure the maximum level of security consistent with the ethos of the Trust is complied with, and
- Ensure statutory health and safety obligations are being met for pupils and staff with additional needs.

Administration and Management

- Manage whole school administrative function(s) and lead all non-classroom associate staff directly or through effective delegation arrangements for multi-sites.

- Design and maintain administrative systems that deliver outcomes based on the school's portfolio.
- aims and goals.
- Manage systems and link processes that interact across the school 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, processes and team efficiencies.
- 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 DfES, LEA and other agencies and stakeholders within statutory guidelines.
- Will lead the school on all issues relating to GDPR including FOI requests in liaison with the Trust's DPO.
- To support the school's and the Trust's strategic communication strategy
- Lead and monitor the safe, cost effective and community focused use of the school site by other users.

People

- Responsible for ensuring that HR and personnel issues are properly managed within the school, working within the Trust's policies and procedures to ensure compliance with employment legislation and associated guidelines.
- Recommend for Headteacher, CFOO and HR Lead approval and adoption, any changes to school staffing structures and strategies to reflect the future needs of the school portfolio.
- To ensure all support staff have up-to-date job specifications and an annual performance review and are appropriately managed by their line managers.
- Provide line management for staff who directly report to this post in collaboration with appropriate professional advisers to support the school's prime activity of teaching and learning.
- In conjunction with central trust HR professionals, review and develop strategies to attract and retain the correct caliber of staff to the school portfolio.
- To encourage, and provide opportunities for, the professional development and

retention of staff.

- Responsible for implementation and monitoring of safer recruitment and employment checks such as the DBS Vetting and Barring Scheme in relation to recruitment and monitoring practices of people doing work with or for the school to ensure the relevant regulations and guidance are adhered to.
- Ensure that the school complies with Keeping Children Safe in Education guidance and legislation.
- Manage the payroll and HR system interface for all school staff.
- Ensure the school's equality policy is clearly communicated to all staff in school.
- Manage recruitment, performance management and development for all support staff.
- Ensure all staff have a clear understanding of the policies and procedures and the importance of putting them into practice.
- Monitor the way policies and procedures are implemented and provide support where necessary.
- Seek and make use of specialist expertise in relation to HR issues.

Data and ICT

- In partnership with the central the Trust's IT Team, to take overall responsibility for IT to ensure staff and students are efficiently supported on a timely basis across sites.
- Maintain appropriate records of data compliance and actions and lead/contribute to all appropriate data requests (such as Freedom of Information or Subject Access), audits, inspections and reviews.
- To collaborate with the Head of Trust IT services on the 3–5-year ICT plan
- Utilise Trust systems to manage school IT equipment.
- Communicate with the Trust's IT Team to ensure schools IT service is meeting the needs and standards of the schools in the portfolio.
- Consult with relevant people and other parties to introduce new technology or improve existing technology for different purposes.
- Ensure that the school has a strategy for using technology aligned to their school improvement plans, ensuring value for money.
- Communicate the strategy and relevant policies, including Data Protection for use of technology across the school.
- Ensure resources, support and training are provided to enable work colleagues to make the best use of available ICT including teaching, learning and assessment systems.
- Aligned with the Trusts disaster recovery plan, ensure contingency plans are in place incase of technology failure.
- Ensure data collection systems providing information to stakeholders are streamlined to

maximise efficiency of the data supplied.

Whole Trust Responsibilities

- Provide effective and efficient administration functions for the school, reviewing staffing structures and work processes on a regular basis to ensure they are fit for purpose.
- Ensure production and distribution of a variety of publications and promotional material within the school and community.
- Ensure the completion of statutory and other returns of the LA, DfE and other organisations.
- Contribute to the Trust Financial and Operations strategic policy.
- Act as Mentor and support to other SBM’s within the MAT
- Support the wider school’s community sharing expertise and contributing to Trust resources.
- Lead on specific Trust wide projects relating to widening the knowledge/ understanding of school business managers.

Networking and Partnerships

- Develop and recommend to the Headteacher(s), SLT strategies and implementation options for the successful marketing and publicity for the school to raise the profile within differing communities and ensure students numbers are at capacity.
- Work with SLT to ensure effective links with local businesses, communities and other stakeholders for a range of activities such as extended schools, fundraising and pursuing sponsorship opportunities.
- Strengthen community links and promote a positive image of the school in collaboration with others.

Projects and New Initiatives

- Discuss and develop specific initiatives with central The Trust’s leaders, the Headteacher and SLT as the lead business services professional and ensure those adopted are embedded across the school in the wider context of the curriculum as well as whole school policies, managing the change process successfully.

Catering

- Work in partnership with the Trust’s Head of Estates and Catering Manager to ensure the catering provision is of high quality and offers value for money including the quality of meals, hospitality and overall service.

This is not an exhaustive list and some changes to both the Job Description and duties may occur.

Responsibilities for all Colleagues:

- Be aware of and understand the School and Trust policies, ensuring at all times that the duties of the post are carried out in accordance with Trust policies.
- Read and have a thorough understanding of the Staff Handbook and School Business Ethics Policy.
- Ensure compliance with all health and safety legislation, risk assessments and associated codes of practice and school policies.
- Review and develop working practice by developing and maintaining effectiveness as a member of the school staff through taking responsibility for own continuing professional development.
- Work effectively with both teaching and support staff, applying own strengths and expertise to contribute positively to the overall aims and objectives of the school.
- Undertake any duty or responsibility that the Headteacher/Chief Executive/Chair of Governors asks relevant to the school's needs as required and are commensurate with the grade.

School Business Manager – Person Specification

Key: A = Application form, I = Interview, R = Reference

	Source of Evidence	Essential (Must Have)	Desirable (Should have)
Qualifications			
A degree or other relevant foundation qualification – ideally in accountancy, business management or a related discipline OR evidence of significant professional experience at an equivalent level Record of Continuing Professional Development	A, I, R	•	
Commitment to achieve the National College of School Leadership Certificate of School Business Management or Diploma of School Business Manager	A, I	•	
Certificate or equivalent in School Business Management, AAT, ACCA, a CIPD (Chartered Institute of Personnel and Development) qualification, NEBOSH, or another industry-standard qualification in an area relevant to the role	A		•
Achieved School Business Manager qualification e.g. DSBM / CSBM	A		•
Knowledge and Experience			
Experience of leadership in an area relevant to the role, ideally in finance, human resources, project, or facilities management	A, I	•	
Managing budgets, financial reporting, financial control and fixed assets	A, I	•	
Delivering training and supporting colleagues to improve performance	A, I	•	

Effectively handling a number of different operational strands	A, I	•	
Working effectively with internal and external partners	A, I	•	
Line management experience	A, I	•	
Experience of strategic planning and/or long-term project management	A, I	•	
An understanding of the current education landscape and the key political issues facing schools	A, I		•
An understanding of the complexities and challenges in working with vulnerable people	A, I		•
Experience of leadership in a not-for-profit setting	A, I		•
Project management	A, I		•
Managing at a complex or multi-site level	A, I		•
Experience of bid writing, gaining sponsorship and developing income generation opportunities	A, I		•
Working with school partners including employers, LA, sponsors, trustees and/or directors	A, I		•
Involvement in school self-evaluation and improvement planning	A, I		•
Experience of working strategically at an organisational level	A, I		•
Abilities and Aptitudes			
Be able and willing to develop and/or further expertise in all	A, I	•	

areas of the role description			
The ability to make tough decisions in the best interests of the organisation	I, R	•	
Able to lead, develop and motivate a team of staff.	I, R	•	
Able to challenge senior stakeholders appropriately	I, R	•	
Excellent communication skills and ability to address all stakeholders, including senior colleagues, trustees, parents, etc. confidentially and assertively.	I, R	•	
Enjoy working with and for children and work at all times to improve children's outcomes	I	•	
Able to work well under pressure, to tight deadlines and across several diverse areas simultaneously	I, R	•	
Excellent IT skills and the ability to learn new systems easily	A, I	•	
To be willing to take a hands-on approach to working with children and support the wider staff team	A, I	•	
Excellent management skills and the ability to motivate, hold accountable and challenge colleagues, peers and teams as well as working as part of a Trust wide SBM team	A, I, R	•	
Demonstrate a high level of computer literacy – highly proficient in Microsoft Excel.	A, I	•	
Excellent attention to detail	A, I	•	
Awareness of the role of national, regional and local bodies in the educational life of the country, i.e., the contribution made to the school by external advisers, OFSTED teams, auditors, National Audit Office advisers, Inland Revenue	A, I	•	

Inspectors and professional consultants			
Understanding of safeguarding, Single Central Record and responsibilities of all adults who work with children	A, I	•	
School financial management and accounting.	A, I, R		•
Knowledge of educational pay scales and terms and conditions	A, I		•
Knowledge of specialism relevant to the sector, e.g. employment law, management accounting	A, I		•
A knowledge of Keeping Children Safe in Education, annual guidance and legislation	A, I		•
Personal Qualities			
Commitment to acting with integrity, honesty, loyalty and fairness to safeguard the assets, finances and reputation of the school(s)	I, R		•
Takes responsibility for own professional development	I, R		•
Reliability, integrity and commitment	I, R		•
Demonstrate good judgement	I, R		•
Think creatively and imaginatively to solve problems and identify opportunities	I, R		•
Be self-motivated to achieve challenging professional goals	I, R		•
Deals with difficult situations effectively	I, R		•
Embraces change well and seeks solutions ahead of escalating accountability	I, R		•

Commitment to safeguarding and equality	I, R		•
Ability to work under pressure and prioritise effectively	I, R		•
Commitment to maintaining confidentiality at all times	I, R		•
Ability to maintain a positive and professional demeanor in person and online modelling a positive culture standard	I, R		•