

## HELIX EDUCATION CENTRE

### JOB DESCRIPTION / ROLE PROFILE

**Job Title:** School Business Manager

**Grade:** G11

**Working pattern:** Full time, Term Time plus 3 weeks

**Responsible to:** Headteacher

**Date:** June 2026

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### ROLE PURPOSE

The School Business Manager is responsible to the Headteacher and occupies a senior post whose main purpose is to assist the Headteacher in his duty to ensure the school meets its educational aims. As part of the Senior Management Team, will play a major role in strategic planning, improving resource management, achieving value for money, and developing administration and support. The School Manager works closely and in full co-operation with all members of staff.

Leads & Manages School Office Staff, Finance Administration, Site Staff, Catering and ICT Resources.

### DIMENSIONS

- To line manage and supervise the school administration team, Site Staff, Catering assistant, and co-manage the Office Manager and the Data Manager.
- Manage the day-to-day running of the school budget, authorising income and expenditure in accordance with the budget plan, ensuring legal financial regulations and procedures are adhered to.
- To manage and oversee the engagement and monitoring of agency staff, both teaching and non-teaching.
- To manage staff responsible for Personnel Administration, including:
  - Maintenance of records of teacher attendance and sickness certification, providing weekly attendance returns and other information for the borough and statistical data for school use as required.
  - Maintenance of training course data
- Conduct annual performance and training related interviews, and maintain an oversight of the training needs and provision for directly managed staff.
- To manage staff responsible for statistical returns as required, including PLASC, Absence Returns etc
- Write whole school policies as directed by the Headteacher

### CONTEXT

- To lead, operate, maintain and develop the financial procedures and systems of the school, in co-operation with the Headteacher, FMS team and Management Committee, ensuring that

legal and safety requirements with regard to people and property and function of the school are maintained

- To work closely and effectively with the whole staff and with management committee members, and to liaise with the officers of the Local Authority and other personnel beyond the school.
- To work within School and Local Authority regulations and policies, including those relating to equal opportunities.

### **Leadership & Strategy**

1. To play a central role in the Senior Leadership Team, attending SLT meetings and to negotiate and influence strategic decision making within the school's SLT
2. To attend management committee meetings and work with the Chair of the Finance and Premises sub-committee
3. To provide support as relevant to the Headteacher and SLT
4. To deputise for the Headteacher as required in relevant fields of expertise, principally Finance, Payroll, Premises and HR

### **Finance Resource Management**

Together with the Headteacher, the School Business Manager is responsible for the financial management of the school and the preparation of the annual budget to be submitted to the Management Committee. The Business Manager will be responsible specifically:

- To evaluate information and consult with the Headteacher and MC to prepare a realistic and balanced budget
- Submit the proposed budget to the Finance & Premises committee for approval and assist the overall financial planning process
- Manage the day-to-day running of the budget authorising income and expenditure in accordance with the budget plan, ensuring legal financial regulations and procedures are adhered to
- Use the agreed budget to actively monitor and control performance to achieve value for money and to ensure that all procurement operates within the principles of best value
- Identify and inform the Headteacher and MC of the causes of significant variance and take prompt corrective action
- Propose revisions to the budget if necessary, in response to significant or unforeseen developments
- Advise the Headteacher and MC 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
- Ensure the school has appropriate procedures and to ensure accurate financial records are maintained (including any unofficial school funds) in accordance with local authority and DfE requirements
- To formulate, monitor, implement and review the school's Financial Management and Procedures Policy, ensuring that it complies with the local authority's financial schemes and the School's Financial Value Standard  
To co-operate, initiate and manage audit procedures as necessary
- To analyse benchmarking data and report to Management Committee as appropriate.
- As appropriate, to prepare, or assist with the preparation of, bids for various grant funding opportunities whether private, borough or Government led.

- To develop ways of raising funds for the school, overseeing any fundraising programmes and the staff involved such as a fundraising committee.
- To maintain insurance records and organise claims
- To ensure the school is fulfilling all aspects of the Data Protection Act
- To manage an equipment inventory

### **HR/Payroll**

- Responsible for the administration of the schools payroll system in a timely and accurate manner, in conjunction with the payroll provider
- Maintaining HR and payroll records on payroll system, ensuring that all contracts are kept updated.
- Working with due diligence to inspect the accuracy of monthly pay & variance reports and disputing and correcting as necessary. Alerting Headteacher to review and authorise, once the payroll data has been verified.

### **Building & Site Management**

- To ensure the appropriate placing and monitoring of all service contracts including cleaning and catering
- To be responsible with the Headteacher on health & safety matters to ensure the safety of the school environment
- To appraise projects for the development of the school and to arrange for estimates for projects, and monitor the work of on-site contractors
- Be a member of the MC Finance & Premises Sub Committee, providing minutes, reports and other guidance as needed, to both this group and the whole MC
- In liaison with the Finance & Premises Committee, to take a key role in the formulation and implementation of the school's Asset Management Plan in conjunction with the Headteacher.
- In liaison with the Headteacher, Caretaker or Premises Manager, and Governors' groups to take a key role in the planning of site developments, the tendering of building contracts, and the engagement of and liaison with, specialist services such as architects, surveyors and structural engineers. To attend contractor site meetings and to undertake day-to-day project management of building refurbishment and construction works.
- In liaison with the Premises Manager/Caretaker and Headteacher, to plan, manage and monitor the effective maintenance, repair, and security of the site and building and its contents

### **Contract Management/Premises**

To plan, manage, monitor and control the use of contractor services and service agreements, such as those covering catering, cleaning, equipment inspections etc, so that value for money is achieved. To advise the Finance Committee as to renewals and changes required, and to play a key role in the tendering and appointing procedures

- Be part of the MC Finance & Premises Committee, providing minutes, reports and other guidance as needed, to both this group and the whole Governing Body
- To monitor updates in government or borough policy and ensure that the Headteacher, Management Committee, or other staff with relevant responsibilities are made aware of any changes.

### **Presentation/Community Cohesion**

- To assist with the PR of the school and the development of a positive image, helping with the design and production of documents and other material issued by the school.

- In liaison with the Headteacher to manage, the school's letting arrangements in terms of hiring out the building, and site and hire of equipment to community groups.
- To manage community extra-curricular activities
- To lead the development of the school website.
- To manage the production of the school brochure, in conjunction with the Headteacher.

## 4 MAIN DUTIES / ACCOUNTABILITIES

List the principal duties/accountabilities of the post and the role specific accountabilities.

### NOTE – ALL MANAGERS

	<b>Generic Duties/Accountabilities</b>
1.	Implement and champion, through service and staff development, the Council's Health and Safety, Equal Opportunity and Information Security Policies.
2.	To ensure that the post holder complies with their responsibilities as laid out in the Council's health and safety policy and takes an active role in promoting a positive health and safety culture.

### NOTE – MANAGERS WITH DELEGATED BUDGETARY AUTHORITY ONLY

	<b>Generic Duties/Accountabilities</b>
3.	To manage the <b>team</b> so that the services provided are responsive to customer requirements, accessible to all areas of the community and provide value for money.
4.	To develop the structures, systems and policies necessary to support effective service delivery.
5.	To motivate, train, develop and performance manage staff to maintain an effective workforce capable of meeting its objectives.
6.	To formulate annual operational plans and budgets for the <b>team</b> so that there are clear priorities and appropriate resources are allocated to their achievement.
7.	To resolve complex and high level operational issues so that they are resolved effectively and precedents are set for the resolution of similar issues.
8.	To develop <b>or contribute to</b> longer term (2-3 years) plans for the services managed so that they are developed in line with Council and School priorities.
11.	To ensure services link effectively with related service provision, within or external to the Council, so that coherent and value for money services are provided. Where appropriate, and in conjunction with other service providers, to undertake joint planning of service delivery and/or for the closer integration of service provision.
12.	Oversee the preparation monitoring and control of the service budget to ensure that expenditure is in line with the agreed business plan.
13.	To manage the teams and service provided in a way that promotes the Council's approach to diversity.

	<b>Service Specific Duties/ Accountabilities</b>
1.	<ul style="list-style-type: none"> <li>Oversee the management of the day-to-day running of the budget; authorising income and expenditure in accordance with the budget plan, ensuring legal financial regulations and procedures are adhered to.</li> </ul>
2.	<ul style="list-style-type: none"> <li>Lead the implementation of ICT and LGFL information system.</li> </ul>
3.	<ul style="list-style-type: none"> <li>Manage MIS within school.</li> </ul>
4.	<ul style="list-style-type: none"> <li>Line manage staff responsible for all data input (<b>SIMS/ARBOR</b>) Pupil database, Assessment, Personnel, Attendance)</li> </ul>
5.	<ul style="list-style-type: none"> <li>Introduce and manage a cycle for School Policy reviews</li> </ul>
6.	<ul style="list-style-type: none"> <li>Write School Policies as directed by the Headteacher</li> </ul>
7.	<ul style="list-style-type: none"> <li>Manage Personnel administration (contracts, recruitment material, advertisements, payroll)</li> </ul>

## 5. SELECTION CRITERIA

### Note for managers:

**Selection Criteria** - List the selection criteria that are essential for individuals to possess in order to do the job. Equality & diversity criteria must be built into the selection criteria to assess understanding, awareness and commitment to equality and diversity in employment and service delivery and how individuals will apply it when carrying out their duties.

**Method of Assessment** - Clearly indicate in the end column which method of assessment or combination of methods will be used to assess each criteria i.e. Application (A), Interview (I), Test (T)

**Ranking Order** – All criteria must be numerically ranked (in the ranking order column) in order of importance with the most important criteria ranked highest relative to other criteria i.e. the most important criteria be given the ranking order of 1, the next most important 2 and so on. Where 2 or more criteria are equally important, they should be ranked the same i.e. both given the same ranking order of 1 for example.

Ranking Order	Knowledge Indicator	Method of Assessment
1	a. an understanding and knowledge of education and schools, including current legislation relating to them	A/I
1	b. have a commitment to the highest standards in education	A
1	c. knowledge of <a href="#">FMS/SIMS/ARBOR</a>	
Ranking Order	Experience	Method of Assessment
2	d. successful experience in a management role and in leading a team	A/I
1	e. experience of managing a large budget including a full understanding of how to plan, construct, and manage a budget; the ability to interpret financial information and to present it clearly to a wide range of people	A
1	f. have worked in a school or college and to have a relevant financial/management qualification	A/I
Ranking Order	Education, Qualifications and Training	Method of Assessment
2	g. qualified to carry out the tasks in the job description.	A
1	h. hold a Certificate/Diploma in School Business Management or equivalent	A
1	i. have advanced computer skills and competency in use of spread sheets	A/I

Ranking Order	Skills and Abilities	Method of Assessment
1	j. the ability to communicate clearly and accurately orally, numerically and in writing	A/I
1	k. to work well as a team member and to have sensitivity and tact in dealing with a wide range of people	A/I
1	l. to have a high level of personal organisation and co-ordinating skills	A/I

1	m. to work well under pressure and to be able to priorities tasks, maintaining patience and good humour	A
1	n. to have a commitment to the principles and practices of equal opportunities and to understand how they impact on the school	A
1	o. To conduct yourself professionally in dealing with the school community	
<b>Ranking Order</b>	<b>Other Essential Factors</b>	<b>Method of Assessment</b>
1	p. Have the capacity to act as a keyholder when required	I
1	q. Ability to form and maintain appropriate relationships and personal boundaries with young people	A/I
1	r. Committed to high standards of customer service	A
1	s. Committed to equality and diversity	A
1	t. Committed to own professional development qualification	A
1	u. Trustworthy and reliable	A
1	v. Able of multi-task	A
1	w. <a href="#">To understand Safeguarding in a school context</a>	A/I