

Job Description

Job Title	School Business Manager		
Location	Southmead Primary School		
Reporting to	Headteacher		
Directorate/Section	Education and Learning		
Effective date of JD			
Grade		Job Number	

Job Purpose:

The postholder is a member of the Senior Management Team with responsibility for the provision and management of a comprehensive administrative support service, to include Finance, Data Protection, Attendance, Catering, IT, Health and Safety, Building and Grounds, Facilities and Personnel Services.

The post is a full-time position for 40 weeks of the year, it is expected that work will be undertaken during 2 weeks of the school holidays.

This role requires the ability to fulfil all spoken aspects of the role with confidence and fluency in English.

Main duties and responsibilities:

Strategic

The postholder will be responsible to the Headteacher and Governors for the Administration, Attendance, Data Protection, Personnel Management, Finance, IT and Health and Safety of the school in line with Governing Body policies.

The postholder will:

- In liaison with the Headteacher, monitor the development and implementation of quality procedures and systems throughout the school.
- In terms of administrative matters, ensure that the school's needs are met and public relations image is enhanced recommending procedural or policy changes where appropriate.
- Provide information and guidance on non-teaching matters to the headteacher and Governing Body, recommending policy and organisation change where necessary to enhance the efficiency and effectiveness of the school.
- Contribute to the school development plan where appropriate.
- Be responsible to the Head and be a member of the Leadership Team, advising on, and contributing to, discussions on all areas of school improvement.
- Contribute to strategic planning, including all financial implications. Ensuring that the school makes the best possible use of resources available.
- Assist with the preparation of the Emergency Management Plan (Business Continuity Plan) for approval by the Governors. Ensure that staff have been trained in the relevant procedures
- Promote a customer service ethos and maximise support available to the school.
- Manage a range of activities within various areas of the school including Finance, Catering, Cleaning, Personnel Management and Administration.
- Ensure that all data is held securely, staff are trained and breaches and near misses are properly recorded

Finance

- Advise the Headteachers and Governors on financial policy, and to prepare appraisals and costings for particular projects and the future development of the school.
- Prepare the draft annual revenue budget for approval of the Headteacher and Governing body showing all income and expenditure.
- Obtain agreement of budgets and to monitor accounts against budgets.
- Maintain relevant records for additional funds e.g. Formula Capital, and advise on allocations, spending and commitments.
- Research alternative funding for specific projects, and support staff to write bids and applications for grants where necessary.
- Prepare regular management accounts and report on the financial state of the school to Governors. Use financial information, particularly benchmarking tools, to identify areas of relative spend. Assess trends and practice 'Best Value' across all expenditure, directly advising the Headteacher.
- Be responsible for the management of the school accounting function, ensuring its efficient operation according to agreed procedures, and maintain those procedures by conducting regular reviews.
- Oversee the Administrator and the Finance and Personnel officer in their financial responsibilities
- Monitor all accounting procedures and resolve problems including those on:
 - The ordering, processing and payment of all goods and services provided to the school.
 - Manage the organisation, charging, and revenue collection for any lettings activities on the school premises. Accept lettings within the relevant policy determined by the Governors.
- Monitor the financial procedures for school trips and residentials, ensuring that appropriate costing sheets are completed
- Reconcile all school income, including cash, cheques and online payments,
- Prepare the thrice yearly Bromcom reports and year-end accounts in line with LA procedures and liaise with auditors where necessary.
- Provide detailed management accounts to Headteacher and Governors according to an agreed schedule, reporting immediately any exceptional problems.
- Negotiate, manage and monitor contracts, tenders and agreements for the provision of support services.
- Be responsible for seeking advice on insurance and advising the Governors on appropriate arrangements. Implementing the approved insurances and handling any claims that may arise.
- Complete all necessary returns as required including those from the LA, DFE, government agencies and others - as required within the timescale given.
- Take necessary action to recover bad debts
- Ensure that the school's financial procedures are in place and that all audits by Devon Audit Services are successfully undertaken and any necessary action is swiftly implemented.

Personnel Management

- Have an overview of all personnel matters including staff contracts prior to issue.
- Give advice to Headteacher and Governors on assessment of salaries, expenses, sickness and maternity procedures, redundancy and other personnel issues affecting costs.
- Maintain confidential staff records and to ensure that staff records held by others in the school are kept confidential.
- Ensure that the personnel database within school is accurate, and to check actual salaries against 'committed' on a monthly basis to ensure correct payments are being made to staff. Investigate and deal with any discrepancies. Clear outstanding

commitments from the system on a monthly basis to ensure adequate financial reporting.

- Monitor forms relating to personnel details e.g. 'additional hours' claims, supply and other timesheets, before they are submitted for action to the LEA. Checking monthly reports from iTrent to ensure employees are paid correctly and on time.
- Authorise and arrange supply cover.
- Manage staff appointments, Health and Safety and GDPR induction and training.
- Line management of Kitchen and Premises Managers, Breakfast and Afterschool club staff and Admin staff, including appraisals.
- Provide leadership and guidance within the admin team. To train new starters in all areas of the admin of the school. To ensure the smooth running of the administrative team and be responsible for the work standards of staff.
- Identify appropriate training courses for the admin team and advise the relevant staff.
- Liaise with the Headteacher about training and charge against the relevant budgets. Advise on the training budget.

Estate Management including caretaking and cleaning

- Manage and oversee third party service contracts including grounds, caretaking and cleaning
- Provide appropriate direction to the contractor's staff on site and liaise with contractors to ensure efficient and effective operation of the contract and the maintenance of high standards
- Be responsible the Headteacher and Governors for the maintenance of the school site and buildings, and the efficient operation of all facilities on the property.
- Know about the main health and safety issues specific to the school and how they relate to students, staff, visitors and contractors.
- Complete Pupil and staff risk assessments for specific injuries.
- Provide an effective reporting system for staff to notify any Health and Safety issues or concerns. Ensure that these are investigated and addressed promptly
- Advise ASBM of any accidents to be reported to DCC through the OSHENS system.
- Be responsible for the letting of the school premises in line with school policies to outside organisations.
- Liaise with other departments e.g. Norse and Capital Strategy to maintain the Asset management plan and to report cases of suspected building defects.
- Agree a programme for cleaning and minor repairs by the caretaker during holiday periods.
- Agree a long-term strategic plan of premises issues with the caretaker.
- Ensure that all Formula Capital projects meet the relevant DFS criteria for spending.
- Authorise minor repairs within the guidelines of the finance policy.
- Co-ordinate the purchase of all furniture and fittings, overseeing repairs as necessary.
- Prioritise and agree with the Headteacher, and Governors where appropriate, all issues relating to non-minor building improvements/repairs.
- Liaise with contractors, working within financial regulations and overseeing all building projects to their satisfactory conclusion.
- Maintain the asbestos register, ensuring all contractors to the school are aware of its contents.
- As a key holder, be responsible for the security of the school when working on site during the school holidays.

Catering

- Line management of Kitchen Manager, including appraisals.
- Maintain a strategic overview of the Kitchen
- Monitor the cost of providing meals, including provisions, energy and staffing, to establish the continued viability of the kitchen. These costings form the basis on which to set meal prices.

- Ensure that the Kitchen Manager keeps to a food budget.
- Ensure that staff undertake relevant training.
- Ensure that all school meal money is collected and banked by the Clerical assistant and debts are chased on a regular basis.
- Determine staffing levels based on number of meals provided.
- Ensure that the quality of the meals provided is maintained and meets Government Food Standards

Administration

- Line management of staff, including appraisals.
- Responsible for the efficient and effective running of the school administrative support services including:
- Manage the administrative function including administrative ICT facilities, records, telephones, emails and texts.
- To be responsible for the systems and general management of the schools administrative and financial systems, the implementation of appropriate Management Information Systems and the full computerisation of the administration, accounting and record system.
- To ensure that all upgrades are installed and completed satisfactorily.
- Responsibility for the completion of the School Census.
- Responsible for the secure storage and administration of Baseline Assessment, Phonics, KS1 and KS2 assessment papers
- Responsible for the secure handling, packaging and collection of all KS2 assessment papers
- Responsible for reporting all statutory assessment results to the relevant authorities

Data Protection

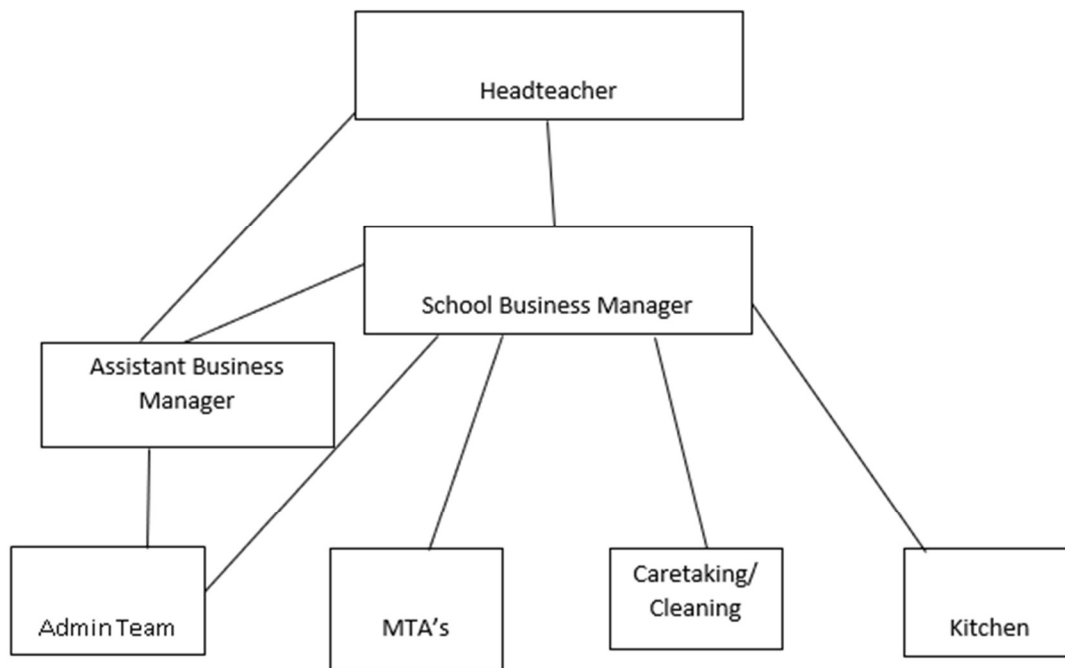
- Responsible for the management of data protection within the school
- Liaise with the Data Protection Officer (DPO) to ensure compliance.
- Investigate data breaches and where necessary report them to the DPO. Act on any advice given and review systems as appropriate.
- With the DPO undertake an annual audit and act on the findings.
- IT
- Provide initial on-site technical IT support for all staff. If unable to resolve the problem liaise with SCOMiS.
- Manage the IT contract providing appropriate direction to contractors on-site and liaising with appropriate staff at SCOMiS
- Liaise with the IT Co-ordinator to ensure that the IT infrastructure of the school is sufficient to meet the needs of the school for the curriculum.
- Set up and maintain staff Office365 and email accounts and undertake the management of the system.
- Be the 'Administrator' for the administration software including Bromcom, Parentpay, My Child at School and other software the school uses.
- Be the 'Administrator' with responsibility for ensuring the systems are up to date for some curriculum software including Twinkle and Provision Map

Person Specification

Attribute	Essential	Desirable	Method of Assessment
Management	◦ Line management of a number of employees in diverse roles		
Experience	◦ Experience of working in an education environment ◦ Budget planning and projection experience ◦ Proven record of financial and administration management		
Practical Skills	◦ Excellent organisation skills ◦ Ability to prioritise a varied workload and cope with competing demands ◦ Able to evaluate own learning needs and those of others and actively seek learning opportunities to address these, share knowledge with others and support their development		
Communication	◦ Excellent written and verbal communication skills. ◦ Ability to fulfil all spoken aspects of the role with confidence and fluency in English		
Personal Qualities	◦ Ability to maintain confidentiality ◦ Ability to work under pressure ◦ Flexible, supportive and proactive approach ◦ Diplomatic ◦ Tactful ◦ Commitment to high professional standards		
Strategic Thinking	◦ Planning and organisational skills ◦ Ability to balance and prioritise competing demands. ◦ Broader and more innovative way of thinking on a daily basis about the overall goals of the job, team and school.		
Technology / IT Skills	◦ Computer literate with good experience and use of Microsoft Office software packages ◦ ICT expertise and skills ◦ Advanced knowledge of spreadsheets ◦ Knowledge of school software packages i.e. Bromcom ◦ Assist with training administrative and other staff to acquire competence in specific ICT programmes ◦ Liaise with service provider for IT software and hardware issues.		
Education and Training	◦ Relevant professional qualifications e.g Certificate/Diploma in School Business Management. ◦ Degree or relevant experience ◦ Good general education with excellent numeracy and literacy skills ◦ Training on the GDPR and the Freedom of Information Act ◦ Willingness to undertake further professional training		
Equal Opportunities	Devon County Council and its staff seek to eliminate discrimination, advance equality and foster good relations.		◦ Demonstrate knowledge at Interview

Physical	Able to carry out the duties of the post with reasonable adjustments where necessary	◦ OH1
Other relevant factors	Commit and conform to DCC Customer Service Standards	◦

Structure chart:



1. Supervision and Management:

Full management responsibility, including appraisals, for up to 12 staff including Admin/Clerical, Lunchtime Managers, Kitchen Manager, Premises Officer, breakfast and Afterschool Club staff.

2. Creativity and Innovation:

- Member of Senior Leadership Team
- Making decisions in relation to the school site especially during the school holidays when solutions need to be provided quickly and effectively.
- Ability to undertake projects that impact on the improvement in service
- Assisting with the development of School Emergency (Business Continuity) Plan including recommendations.
- Preparation of the School Budget (three year plan) - prepare and present to Governors with recommendations and costings - cost different options with a view to establishing services or re-allocation and maximisation of resources
- Source and negotiate with suppliers for Best Value for provisions and equipment.
- Perform tendering process for Capital projects, evaluate submissions and make recommendations to Governors.
- Liaise with contractors, sub-contractors and DCC staff regarding design, planning and building of any new facilities
- Manage short term contracts and ensure completion by due dates.
- Continue to improve communication with parents and stakeholders, Community liaison and public relations.
- Financial contribution to, and annual collation/production of the School Development Plan.
- Undertake assessment and monitor financial procedures
- Induction for staff, organise staff training, appraisals, pay progression, notification of threshold dates for teaching staff, ensuring staff vacancies are advertised at correct pay rate.
- Ensure IT upgrades are made and inform staff of software changes and initiate training, as required.
- Report to Governors and other bodies including Finance, Sites & Buildings and redundancy.
- Ensure an effective reporting system is in place for Health and Safety issues and concerns
- Create a reporting culture through training and communication so that staff report Data Protection near misses as well as breaches

3. Contacts and Relationship:

- Work closely with the Headteacher providing information and advice, assessing and developing areas.
- Be a member of the Senior Management Team providing information and advice.
- Provide support, information, advice and IT assistance to staff
- Deal with disagreements between staff and try to resolve the issues by being sensitive and negotiate an amicable outcome. Outcomes could affect the work within the office, the kitchen or other area of the school.
- Liaise and negotiate with contractors and suppliers as required for provisions and equipment (including IT software and upgrades)

4. Decisions - Discretion:

- Responsibility for upgrading/purchasing PCs.

- Assessing situations and devising a way forward when care and planning is required to avert an undesirable outcome; there is some authority to decide what services are provided.
- Responsibility for procurement of goods and services.
- Making recommendations to Headteacher for goods and services up to £5000 and Governors on procurement above this amount.
- There is freedom to act in a large area of the work, for which the Postholder holds responsibility, without the need to seek ratification or advice. Active decision making and negotiation is required to ensure smooth and effective service provision.
- Review the admin systems and use organisational strategies to reorganise allocation of duties when it is necessary to do so.
- Ensure software is updated when required, and all staff are informed of any changes in software. Ensure training is undertaken by those who will use any new software.
- Review staffing levels and make recommendations regarding appointments, taking into account financial planning and capacity projections.
- Review monitor and evaluate relevant policies including finance and administrative policies.
- Responsibility for the tasks and duties of administrative department.
- Responsible for the secure storage and administration of Baseline Assessment, Phonics, KS1 and KS2 assessment papers
- Responsible for the secure handling, packaging and collection of all KS2 assessment papers
- Responsible for reporting all assessment results to the relevant authorities
- Authorised user and keyholder of school buildings.
- Recommend to Headteacher and Governors allocation of financial resources when setting the budget
- Be involved in the decision making process affecting financial resources, staffing levels, staff deployment and admissions.
- Be involved in the quality of service offered by the school.

5. Decisions - Consequences:

Decisions made are significant and will affect the operation of the school and will affect staff, children and parents. Decisions could include review of systems, may change the way in which people work or the way in which a service is delivered or what services are provided.

These decisions could affect individuals internally or externally. Decisions are aimed at improving existing systems. It is important to implement appropriate and efficient deployment of staff in admin, educational support and catering staff. When distributing duties, best financial value, efficiency and staff welfare must all be taken into account.

6. Resources:

- Accountable for the accurate handling/security of cash and cheques.
- Petty cash account of £5000:- Will hold a school debit card for petty cash account with a maximum spend of £1000 per month.
- Registered key holder. Telephone contact for staff/others to report water leaks etc out of normal hours. Liaise with caretaker out of normal hours.
- Responsible for lettings.
- Responsible for laptop and the security of data held on it. This is regularly taken off site.
- Responsible for administration system, register of staff laptops, Office 365 and email accounts and security. Software installation/maintenance. Manipulation and presentation of data including finance, personnel, student records, administration documents and assessment.

7. Work Demands:

- A requirement to manage several ongoing tasks at the same time, whilst dealing with interruptions caused by personnel queries and last minute supply cover for changing events and circumstances. Requires a flexible approach in order to maintain admin, catering and curriculum activities.
- Planning workload and tasks, both personal and across the support team in response to changes, both short and long term.
- Daily programme is frequently subject to change, due to unscheduled and unforeseen events
- The work programmes is subject to constant change, and this is an ongoing feature of the work with often considerable upheaval on work patterns, at least on a daily basis.
- Deadlines are often imposed by a particular set of data/information required for official purposes e.g. School Census, Budget monitoring return, payment deadlines, personnel forms.
- Supply cover needs to be in place by 8.30 am.
- Reports to Governors in time for distribution prior to meetings.
- Accountable for time management to set own and admin team deadlines.

8. Physical Demands:

Physical effort will include sitting and standing during normal office duties such as filing and working for prolonged periods at the computer.

9. Working Conditions:

- Mainly indoors (90%).
- Outdoors for checking on health and safety issues, site management and maintenance requirements (10%)

10. Work Context:

- Mainly office based, open door policy operated.
- Frequently address contentious issues with parents with specific needs, (procedures are laid down to deal with aggression from a member of the public).
- Lone working during the school holidays

11. Knowledge and Skills:

Relevant professional qualifications eg Certificate/Diploma in School Business Management. Educated to degree level or relevant experience.

Working on many advanced and complex tasks with responsibilities that affect most work areas across the school site. May be required to have an input into how the work is done and may have control over the work area.

Knowledge of Child Protection, KCSiE, School Workforce Planning

Detailed knowledge and understanding of legislation, policies and procedures that may impact on the school. This will include knowledge of School Policies, Financial Management Standards in Schools, Tendering process, Health and Safety, Government Food Standards, personnel issues

Detailed knowledge of software systems.

Mandatory training for premises managers in Legionella, Asbestosis, CDM and Fire Safety and Awareness.

Understanding of the school's requirements and how these can be met with regard to administrative systems and procedures, Teaching Assistant requirements in the classroom, Catering Staff in the kitchen, Mealtime Assistants at lunchtime and site management.

Use tact and diplomacy to manage staff and deal with personnel issues.

Specific skills in communication (verbal and written), management, IT, project management, procurement, negotiation, decision making.

Highly proficient skills in the following areas:

- Communication, both verbal and written.
- Use of IT including Office 365, Excel, Word, Publisher.
- Project Management.
- Statistical Analysis.
- Business Planning.

Detailed knowledge of the systems used in the school, gained through many years of experience. As a member of the Senior Management Team, the postholder is required to advise on resources available and able to provide any future requirements, within budget.

Detailed knowledge of all the staffing requirements and the personnel within the school.

Expertise in Finance and Personnel. Ability to use this effectively to ensure the smooth running of the school, using good communication and administrative skills.

Detailed knowledge of FMSiS (Financial Management Standards in Schools) and SFVS (School Financial Value Standard)

After health and safety checks ensure any issues are dealt with effectively on site.

Liaise with the Assistant Business Manager and site caretaker to ensure all health and safety checks are carried out as and when required. Make decisions that have staffing and financial implications concerning repairs and maintenance around the School.

Health & Safety:

Potential Hazards	Applicable to this job? (✓)	Action to be taken (text)	<u>Examples of action to be taken (this list is not exhaustive)</u>
Display Screen Equipment	✓	Workstation assessment	Conduct regular workstation assessments through Cardinus software
Electricity – fixed / portable	✓	Compliance testing by accredited body	Ensure PAT ¹ certificates are up-to-date
Manual handling	No		Ensure J/H attends appropriate training
Verbal / physical abuse	No	Staff Policy provides for code of conduct	Ensure J/H is familiar with appropriate policies & procedures
Work equipment	No		Ensure J/H is familiar with all equipment and its proper usage and maintenance
Fire	✓	Induction training. Fire Prevention Policy	Ensure J/H is familiar with evacuation procedures and use of fire-fighting equipment (if appropriate)
Environmental	No		Wear appropriate PPE ²
Isolation / lone-working		Office Hrs. May on occasion work during holiday periods for limited time. Aware of lone working policy.	Ensure J/H is familiar with appropriate policies & procedures
Slips, trips & falls	✓	Health and Safety Policy	Ensure J/H is familiar with appropriate policies & procedures
Chemical			Ensure J/H is familiar with appropriate policies & procedures and wears PPE if required
Working with Vulnerable persons			Ensure J/H is familiar with appropriate policies & procedures
Premises related		Office based	Ensure J/H is familiar with appropriate policies & procedures
Transport risks		Office based	Ensure J/H is familiar with operation of vehicle(s) and safety procedures
Working at heights		Any requirement for working at height or manual handling to be referred to maintenance dept..	Ensure J/H wears appropriate PPE and follows safe system of work
Other hazards not identified above		To be dealt with on an individual basis if relevant	Deal with on an individual basis,

¹ Portable appliance test

² Personal protective equipment

Signatures

Job Description agreed by:

Line/Originating Manager:

Name:_____ **Signature:**_____ **Date:**_____

Head of Service/Head teacher:

Name:_____ **Signature:**_____ **Date:**_____