

**JOB DESCRIPTION**

<b>Job Title</b>	<b>School Business Manager</b>		
<b>Location</b>	NAME Primary School		
<b>Reporting to</b>	Head teacher		
<b>Post Number</b>		<b>Grade</b>	G
<b>Directorate/Section</b>			
<b>Effective date of JD</b>		<b>JE Job Number</b>	G.1384

**Job Purpose:**

The postholder is a member of the Senior Leadership Team with responsibility for the provision and management of a comprehensive administrative support service, to include Finance, Catering, Cleaning and Personnel Services.

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 support the Headteacher and Governors in the management of a comprehensive administrative support service to the school in line with Governing Body policies.

In liaison with the Headteacher, the postholder will:-

- monitor the development and implementation of quality procedures and systems throughout the school.
- In terms of administrative matters, to ensure that the school's needs are met and public relations image is enhanced.
- Contribute to the school development plan where appropriate.
- To 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.
- To be responsible for strategic planning, including all financial implications. Ensuring that the school makes the best possible use of resources available.
- To 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.

## **Finance**

- To advise the Headteachers and Governors on financial policy, and to prepare appraisals, costings and business plans for particular projects and the future development of the school.
- To prepare the draft annual revenue budget for approval of the Headteacher and Governing body showing all income and expenditure. To obtain agreement of budgets and to monitor accounts against budgets. To maintain relevant records for additional funds e.g. Formula Capital, Extended Schools, Travel Plan and advise on allocations, spending and commitments. To prepare regular management accounts for budget holders and to report on the financial state of the school to Governors.
- To use financial information, particularly benchmarking tools, to identify areas of relative spend. To assess trends and practice 'Best Value' across all expenditure, directly advising the Headteacher.
- To be responsible for the management of the school accounting function, ensuring its efficient operation according to agreed procedures, and to maintain those procedures by conducting regular reviews.
- To monitor all accounting procedures and resolve problems including those on:
  - The ordering, processing and payment of all goods and services provided to the school.
  - The operation of the school bank account, ensuring that a full reconciliation is undertaken once per month.
- Manage the organisation, charging, and revenue collection for any lettings activities on the school premises. To accept lettings within the relevant policy determined by the Governors.
- Manage the financial procedures for school trips and residential, ensuring that appropriate costing sheets are completed along with Vat recovery and risk assessment forms.
- To collect, reconcile and record all school income, including school meals. Correctly receipt according to procedures.
- To prepare the year-end accounts in line with LEA procedures and liaise with auditors where necessary.
- To provide detailed management accounts to Headteacher and Governors according to an agreed schedule, reporting immediately any exceptional problems.
- To negotiate, manage and monitor contracts, tenders and agreements for the provision of support services.

- To 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.
- To complete all necessary returns as required including those from the LA, DCSF, government agencies and others - as required within the timescale given.

#### **Personnel Management**

- To have an overview of all personnel matters including staff contracts prior to issue.
- To give advice to Headteacher and Governors on assessment of salaries, expenses, sickness and maternity procedures, redundancy and other personnel issues affecting costs.
- To maintain confidential staff records and to ensure that staff records held by others in the school are kept confidential.
- To 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. To investigate and deal with any discrepancies. To clear outstanding commitments from the system on a monthly basis to ensure adequate financial reporting.
- Authorising forms relating to personnel details e.g. 'additional hours' claims, supply and other timesheets, before they are submitted for action to the LEA. Ensuring employees are paid correctly and on time. Reconciling claims at month end.
- To authorise and arrange supply cover.
- Manage staff appointments, induction and training.
- Line management of Teaching Assistants and Mealtime Assistants, including appraisals.
- To 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.
- To identify appropriate training courses for the admin team and advise the relevant staff.
- To liaise with the School Professional Development Coordinator and maintain an excel spreadsheet that records all identified training and charge against the relevant budget. To advise on the training budget.

#### **Estate Management including caretaking and cleaning**

- Line management of staff, including appraisals and the day to day monitoring of work.

- To liaise with the Headteacher, caretaker and Governors with regard to the maintenance of the school site and buildings, and the efficient operation of all facilities on the property.
- Designated member of staff for Health and Safety
- To know about the main health and safety issues specific to the school and how they relate to students, staff, visitors and contractors.
- To discuss with the caretaker and Headteacher all matters relating to fire risk assessment and fire procedures.
- To be responsible for the letting of the school premises in line with school policies to outside organisations.
- To liaise with other departments e.g. NPS and Capital Strategy to maintain the Asset management plan and to report cases of suspected building defects.
- To meet regularly with the caretaker to discuss all premises issues, and to deal with matters arising from those meetings as appropriate.
- 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.
- To authorise minor repairs within the guidelines of the finance policy.
- To prioritise and agree with the Headteacher, and Governors where appropriate, all issues relating to non minor building improvements/repairs.
- To 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.
- Ensure that checks are carried out on a regular basis for PAT testing and legionella.

### **Catering**

- Line management of staff, including appraisals.
- Write and continue to implement the business plan for the catering centre of the school, to include:
- Maintain a strategic overview of the catering unit
- Monitor the cost of providing meals, including provisions, energy and staffing, to establish the continued viability of the unit. These costings form the basis on which to set meal prices.
- Ensure that the Kitchen Manager keeps to a food budget. Check all invoices for correct prices and review contracts with suppliers periodically.
- Ensure that staff undertake relevant training.
- Liaise with Client support to ensure that menus set are balanced and nutritious.

- 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 minimum 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 and telephones.
  - To be responsible for the systems and general management of the schools administrative and financial computer network, 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.
- To deal with admissions to the school, liaising with parents and the DCC Admissions Team.
- Responsibility for the completion of the School Census.
- Development of school publications and communications e.g. prospectus, newsletter, staff handbook.

**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	◦	◦
Practical Skills	◦	◦	◦
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 ◦ Diplomatic ◦ Tactful	◦	◦
Strategic Thinking	◦	◦	◦
Technology / IT Skills	◦ ICT expertise and skills ◦ Advanced knowledge of spreadsheets ◦ Knowledge of school software packages i.e. SIMS	◦	◦
Education and Training	◦ Qualified as a SBM through the NCSL and working towards the DSBM. ◦ HNC Business (distinction). ◦ Good general education with excellent numeracy and literacy skills ◦ Training on the Data Protection Act and the Freedom of Information Act		◦
Equal Opportunities	◦ Devon County Council and its staff have a Statutory obligation to implement anti-discriminatory and equal opportunities when carrying out their duties	◦	◦ 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	◦	◦

**Supervision and Management:**

Full management responsibility, including appraisals, for up to 15 staff including Admin/Clerical, Mealtime Assistants, Teaching Assistants, Caretaking and Cleaning staff, Kitchen staff and Technical staff.

**Creativity and Innovation:**

Member of Senior Leadership Team

Making decisions in relation to the school site during timetabled and scheduled commitments of the Head and other Senior Teaching staff, averaging one day per week during term time.

Devising School Business 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

Devise and develop systems to cope with changes in policies, administration and financial implications (budgetary affects on staff contracts).

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.

New building project – key player in negotiations, risk assessment, finance, letting management and marketing. Community liaison and public relations.

Negotiate annual property management contract with supplier and hold evaluation meetings on a regular basis.

Negotiate contract for photocopier.

Induction for staff, organise staff training, staff timetabling, 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.

Devise and implement a solution to track and maximise attendance of Traveller children in the form of a “texting” system, and be the first point of contact while they are away, and then when they return to start the reintegration process.

Track absence amongst certain groups of children and meet with parents to encourage attendance. Report and meet regularly with Education Welfare Officer.

Re-design school meal payment and reconciliation system to ensure no debt at any time.

Act as Outdoor Education Coordinator responsible for trip management, risk assessment, feasibility, costing and evaluation.

Ongoing negotiations with DDS and 'Healthy Schools' to ensure delivery of sound nutritional standards. Development of Lunchbox Policy.

**Links with other officers, Service users or Members of the Public:**

Liaise with SCOMIS over software and admin PCs, to ensure all software and upgrades are installed and PCs are adequate for purpose.

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 a class, the kitchen or other area of the school.

Negotiate with suppliers for provisions and equipment.

Negotiate with DCC regarding cleaning contract .

Negotiate with property maintenance provider .

Negotiate with architects, NPS and DCC ref new school building.

Negotiate contract for photocopiers for both the main school site and the new building, and ensure they are upgraded when necessary and fit for purpose.

Arrange with contractors for site maintenance out of normal school hours.

Liaise with DCC over leasing of areas of school premises to outside agencies.

Main contact with external provider of after school club to ensure smooth running of agreement (ensure any grievances on either side are dealt with promptly), as well as providing financial support recommendations and support to ensure self-financing.

Work in a parent liaison capacity as the nominated person for Domestic Violence and Abuse enabling postholder to signpost parents to the appropriate help.

Relationship building and understanding of our families with varying religions, to ensure no discrimination takes place. Working on the timetable to ensure minimum impact on the children.

**Levels of Responsibility:**

Sole 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.

Sole responsibility for purchases of goods and services up to £1500. Making recommendations to Headteacher 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.

Authority to close school or parts of site should circumstances dictate (caretaker only on site during opening and closing hours, hence overall responsibility for site and all associated issues).

Operation of efficient and smooth running of school to achieve an effective learning environment. As previously mentioned, make recommendations for provision of goods, contract negotiation, and evaluation of historic events and decisions.

Overall responsibility (named person) for the delivery of outdoor education across the school.

#### **Effects of Decisions:**

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.

#### **Resources:**

Accountable for the accurate handling/security of cash and cheques.

Petty cash account of £150:- Will hold a school debit card for petty cash account (the Headteacher holds the only other card).

Registered key holder, no: 2 on call out rota after the Caretaker and a contact out of normal hours. Telephone contact for staff/others to report water leaks etc out of normal hours. Liaise with cleaners out of normal hours.

Responsible for lettings.

Responsible for administration system, server (network) access and security. Software installation/maintenance. Manipulation and presentation of data including finance, personnel, student records, administration documents (not assessment).

Plant and equipment - As the designated member of staff for Health and Safety:-responsible for making sure the maintenance tools and equipment e.g. ladders, are kept safe and are annually risk assessed and monitored for condition to ensure the operators' safety and security.

#### **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 8.50 am.

Reports to Governors in time for distribution prior to meetings.

Accountable for time management to set own and admin team deadlines.

Deadlines for Health and Safety audits, and completion of repair works and maintenance.

#### **Physical Demands:**

Physical effort will include sitting and standing during normal office duties such as filing and use of information technology. On rare occasions, emergency cleaning duties. Team Teach training has been undertaken and procedures used when the need arises.

**Working Conditions:**

Mainly indoors (90%).

Outdoors for checking on health and safety issues, site management and maintenance requirements (10%)

**Work Context:**

Mainly office based, open door policy operated. First port of call for many parents with an array of needs. Have undertaken parent liaison training to meet demand. Frequently meet with prospective parents regarding admission to the school. Frequently address contentious issues with parents with specific needs, (procedures are laid down to deal with aggression from a member of the public).

**Knowledge and Skills:**

Qualified as a SBM through the NCSL and working towards the DSBM.

HNC Business (distinction).

Completion of accredited Domestic Violence and Abuse – Impact on children course. Constantly updating skills and attending specific training sessions.

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.

Detailed knowledge of Child Protection, Every Child Matters, Workforce Development

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 (having completed a course), Government Nutritional 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