



**EER249**  
**North London**  
**£50,000**  
**Immediately Available**

Accomplished School Business Manager and Associate Finance Consultant with over 20 years' experience in strategic financial, operational, and administrative leadership within the education sector. Proven track record of transforming underperforming school business functions into efficient, profitable operations while ensuring robust compliance and governance. Skilled in financial planning, resource management, and leading collaborative teams to deliver measurable improvements and sustainable outcomes.

### **EER249**

Part Qualified Accountant and member of the Senior Leadership team with a proven track record in finance management, procedures and control, internal and external auditing requirements, procurement and management of projects, premises management, staff recruitment, and the implementation of robust systems for the recording and management of data.

20 years' experience gained as a School Business Manager and 4 years as an Associate Finance and Audit Consultant within the educational sector, with a focus on the strategic financial, administration, facilities, personnel, and support service objectives. Proven experience of running external businesses in conjunction with the main school core budget function and making significant improvements in relation to the procedures and processes to turn them from a failing to profitable enterprise.

#### **Core Skills:**

- **Experience** – Over 20 Years' experience in an SBM role both in Local Authority and V.A Schools
- **Software** – Experience of FSM, SIMS, HCSS, Microsoft Office, Schoolcomms, RM, Agresso and Access.
- **Managing Self and personal skills** - Maintain professional values and ethics. Lead by example to encourage learning and improvement in a safe, supportive working environment.
- **Providing Direction** - Provide leadership and ensure compliance with legal, regulatory, ethical, and social requirements. Encourage staff to ask questions, learn from their mistakes and reach their full potential in a safe working environment. Build no fault teams where there are no stupid questions.
- **Facilitating Change** -Plan and lead teams to build capacity to implement organizational change. To be aware of the team's strengths and weaknesses and monitor staff wellbeing during times of change and uncertainty, ensuring all team members feel valued and supported. Give staff opportunities to reflect and put forward changes and build solution focused individuals and teams.
- **Collaborating with people** - Build, develop and lead collaborative teams and develop productive relationships with colleagues and stakeholder. To be open and transparent regarding information, and providing information in varying formats to all levels in a non-judgmental and professional way
- **Effective use of Resources** -Manage financial and physical resources through the implementation and monitoring of robust financial procedures and policies. This then ensures more accurate data on which to base decisions.
- **Achieving Results** –I have achieved 7 Significant assurances in my last two external audits including budget setting and monitoring, procurement, staffing, payroll, and personnel and security of date.



### **Career Summary:**

#### **October 2021 to December 2025 , Associate Finance and School Business Manager Consultant**

Providing high quality strategic advice and guidance to customers on a remote basis, with a particular focus on delivering a high standard of expertise in strategic financial management. This role is conducted across a selection of maintained, academy or free schools and blended to suit the needs of the customer, providing solutions, advice, and guidance, ensuring the customer feels supported every step of the way.

#### **Key Responsibilities:**

- Understand education strategic direction and provide leadership in strategic and financial planning
- Prepare and contribute towards short, medium and long term financial plans
- Advise on the most effective use of resources
- Advise on contract and risk management
- Provide clear financial information, advice, and guidance to Headteachers, Board of Governors/Trustees
- Prepare and submit statutory returns for maintained schools to include Quarter, Capital, and CFR returns
- Prepare and submit annual budgets to LAs/EFSA as appropriate
- Prepare and submit monthly management accounts and attend meetings where required
- Conduct independent verification of private fund accounts
- Provide training in financial processes
- Ensure regularity, propriety and value for money is achieved through the management of public funds
- Ensure delegated financial authorities are respected
- Provide advice and guidance on fit for purpose policies and procedures
- Provide support, guidance, information and challenge to schools and academies
- Manage customer and team relationships in a professional manner
- Provide advice and guidance on procurement and tenders
- An understanding of education finance trends
- Responsibility for keeping up to date with current changes in education legislation and guidance
- Maintain accurate records, ensuring confidentiality
- Time management of workload and managing expectations of our customer's contracts.
- Finance systems used include SBS Budgets, HCSS, FMS, SIMS, RM, Access, Access Budgets, Sage 200, SIMS Finance, PS Financials

#### **September 2017 to 30<sup>th</sup> June 2021; School Business Manager, London Primary School**

A member of the Senior Leadership Team and reportable to the Governing Board. Responsible for a budget of £1.9M plus £162K of additional business generated income. Responsible for 29 admin, site, support, and Kitchen staff.

#### **Key Responsibilities:**

- Provides strategic leadership and operational management of the Resourcing and development of the school to provide the highest standard of education for our pupils.
- Providing professional leadership and management of designated school support staff to enhance their effectiveness to achieve improved standards of learning and achievement.
- Promote a high standard of business ethos and integrity within the administration function and strategically



- ensures the most effective use of resources in support of the school's learning objectives
- As Part of the senior leadership team make a significant impact to the growth and development of the school
  - To deal with complex and wide-ranging problems daily using initiative to ensure successful and timely outcomes and the development and improvement of systems, as necessary.
  - In the absence of the Headteacher and Deputy take delegated responsibility for financial and other decisions
  - Responsibility for budget planning. Monitoring and control in line with agreed financial policies and procedures
  - Management of school private, trust and business funds ensuring compliance with audit requirements
  - Manage the day-to-day work of the school support teams under my remit
  - Lead and manage recruitment, induction, performance management, and training for staff under my remit. Ensure Personnel files are maintained in line with safer recruitment policy.
  - Ensure that robust systems are in place for the managing of the Single Central Record
  - Oversee and authorise payroll services for all school staff
  - Monitor, assess and review contractual obligations for outsourced school services
  - Manage the delivery of Capital and Revenue projects
  - Act as the school's Health and Safety Co-ordinator
  - Lead responsibility in the management of income generation, including the After School Club and in-house School Meals function and delivery service.

### **February 2009 to September 2017; School Business Manager, West London Primary**

Part of the Senior Leadership team with Budget responsibility of £2.4M and 7 staff including the finance office, premises, and cleaning team.

#### **Key Responsibilities:**

- To prepare a detailed budget plan for submission to, and approval by, the Governing Body and Headteacher and provide specific expertise in long term financial management
- The development of 5-year financial plans, ensuring it is linked to the school's development plan, strategic plan, and improvement of children's learning outcomes together with the identification and securing of new funding streams
- Ensuring that financial transactions in the school are carried out in an appropriate manner, strong financial controls and procedures are adhered to and that resources are used to the best effect, through on-going support to staff with delegated budgets
- Preparation of accurate and up-to-date financial and management accounting reports and forecasts for a range of stakeholders, in an appropriate format for the level of stakeholder, upon which strategic decisions can be made
- Ensuring that value for money and a balanced budget is always achieved through robust management and monitoring and Identification, analysis and reporting of variances as and when they arise
- Co-operation with initiation and management of audit procedures and Ofsted and DfE Financial policy
- Manage the contract tendering for all school services, whilst ensuring that compliance with the procurement policy and procedure is adhered to. Ensure all contracts are regularly monitored and reviewed with a view to appropriateness, cost effectiveness and contract outcomes.
- Submission of Capital bids to the LA, tendering of contracts, monitoring and control of project budget and contractors
- Overall management responsibility of the school site and it's buildings together with their maintenance, development, site security and efficient use and maintenance of Inventories
- Ensure compliance regarding confidentiality and data protection regulations are always adhered to
- Maintain accurate data for all pupils and staff and responsibility for returns to DfE and LA



- The formulation, implementation and review of the school's Health and Safety policy, including risk assessments, fire safety, and first aid within the organization whilst ensuring legal requirements are met
- Developing rigorous systems to ensure the safeguarding of every pupil by vetting staff, volunteers, and external providers in accordance with the latest guidance from Central Government and the Local Authority
- Provide advice to Senior Leadership Team and Governors on matters relating to assessment of salaries, maternity leave, staff absence and secondments
- Managing an Admin and Premises staff team

**September 2000 – February 2009; Finance Officer and then Bursar - Essex Primary School.**

- Ensure that value for money and a balance budget is always achieved through ongoing management and monitoring of the schools' budgets
- Ensure strong financial controls are adhered to, and resources are used to the best effect through the Development and Implemented the school financial procedures manual
- Achieved FMSiS accreditation in March 2008
- Development of long-term financial plans and identification and securing of new funding sources
- Engender positive and constructive interactions with the entire school community as well as outside agencies and partners
- Actively promote the image of the school, and function as articulate ambassador to develop contacts and raise the school profile
- Play a vital contribution in the successful delivery of School Improvement Initiatives, which leads to better outcomes for pupils
- Help to ensure the smooth and successful running of the school by supporting the Head teacher in dealing with leadership, management and administration complexities that confront them
- Ensure efficient operation of the schools' facilities
- Undertake contract tendering ensuring that regulatory compliance is met, and the monitoring and review of contracts
- Have undertaken further Bursar training, Investment in Excellence and Remodelling Consultant Training, and have presented at a local Bursar conference

**Professional Qualifications:**

Diploma of School Business Management (DSBM)  
Advanced Diploma in Administration Management (IAM)  
Association of Accounting Technicians Intermediate and Final (AAT)  
NVQ IV in Accounting (Industry & Commerce)  
Certificate of School Business Management (CSBM)  
International Diploma in Administrative Management (IAM)  
Institution of Occupational Safety and Health (IOSH),  
Managing Safely Investment in Excellence (IIE)  
Remodelling Consultant Training (NCSL)  
Safer Recruitment in Education (NSPCC)