**BURSAR, THE SWANAGE SCHOOL - JOB DESCRIPTION**

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| **Job purpose** |

To provide strategic vision and management leadership in all commercial and business aspects of the Swanage School in order to support the provision of outstanding education to the pupils of the School

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| **Key Accountabilities of the role** |

The Bursar’s success will be measured by:

* The existence of an agreed financial strategy for the school
* The existence of effective and agreed business and asset management plans
* Demonstrable control of the school finances and assets
* Demonstrable leadership of Facilities and IT services in the school
* Up to date, compliant and adhered to processes for finance, HR and Health & Safety
* The quality of information and advice provided to the Headteacher and Governors

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| **Main responsibilities and duties** |

**Financial Management**

* To develop and monitor a long term financial strategy for the school.
* To prepare draft annual revenue budget for approval of Headteacher and Governing Body.
* To monitor expenditure and other financial commitments against budget and maintain the accounting records of the school including banking of cash, reconciliation of accounts, orders, purchases and VAT.
* To advise the Headteacher, budget holders and the Governing Body as appropriate, of any significant variation from the agreed financial strategy or approved budget and assist in the preparation of proposals to correct budget variations.
* To manage the timely and accurate close down of the financial accounts
* To manage the ordering, processing and payment of all goods and services ensuring compliance with the approved budget and financial regulations.
* To ensure that all financial returns are accurately prepared and returned. This will include regular returns for the payroll service, HRMC, Companies House and the Department for Education.
* To ensure that the school financial regulations and supporting guidance and policies are regularly updated and complies with best practise and are communicated and applied throughout the school.
* To liaise with both internal and external auditors and to develop and implement action plans for any proposals that may arise from these external reviews.

**Personnel Administration**

* To participate in the selection process for staff
* To ensure that accurate personnel records, including sickness and other absences are maintained and information passed on to the payroll service provider as necessary.
* In consultation with the Headteacher, produce job descriptions, person specifications and advertisements for vacant posts as required.
* To carry out the administrative processes relating to recruitment and other staff changes, including the seeking of references, medical clearance and DBS checks as required.
* To ensure that all staff are paid on the correct scale in consultation with Governors and to provide appropriate information on pay to staff and the service provider.
* To be the first contact for all staff at the school on pay and contract related issues, liaising with the payroll provider as necessary.
* In consultation with the Headteacher, to ensure that all administration and staff procedures, guidelines and policies are regularly updated and comply with best practice

**Facilities Management including Health &Safety**

* To take the lead in advising and guiding the Headteacher and Governors on property and premises related matters including the preparation of a school asset management plan as well as capital development budgets and programmes
* To manage and direct the Facilities Manager so as to ensure

1. school premises, services and equipment, are safe and fit for purpose.
2. the catering service is delivered effectively and within budget.
3. the safe maintenance and operation of all school vehicles
4. premises and health & safety procedures, guidelines and policies are regularly updated and comply with best practice

**Information Systems**

* To direct the delivery of the agreed IT Strategy.
* In conjunction with the Network Manager, to advise the Headteacher and Governors on the use and development of IT systems and infrastructure
* To manage and direct the Network Manager to ensure
  1. computer based financial, administrative and communication systems are kept fully accurate, secure and up to date at all times.
  2. The Headteacher and Governors are informed of improvements that could be used to improve educational outcomes

**Other responsibilities**

* To ensure that appropriate insurance is in place to meet the requirements of the school risk register.
* To inform and advise the governing body, the Headteacher and employees about their obligations to comply with the GDPR and other data protection laws
* To monitor compliance with the GDPR and other data protection laws
* To work with the Clerk to the Governors to ensure that all returns to Companies House are coordinated, timely and correct
* To develop and implement an income generation strategy for the school
* To undertake other responsibilities as may be requested by the Headteacher from time to time

**BURSAR, THE SWANAGE SCHOOL – PERSON SPECIFICATION**

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| **Knowledge and Skills** |

Knowledge and experience of managing financial and business services is essential. Experience in monitoring and improving systems and procedures is also essential. Experience of finance and business administration in schools and/or the public sector is highly desirable as is experience of charities accounting. A relevant and formally recognised management, financial or equivalent professional qualification to support this experience is considered highly desirable.

Evidence of strategic thinking and project management are essential. Knowledge and experience of the leadership of Information System development and application are desirable.

Effective and developed interpersonal skills are considered essential as are well developed managerial, administrative and organisational skills. The individual has to have the personal credibility to deal with a wide range of staff and represent the school in dealings with external representatives (e.g. contractors, architects and accountants).

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| **Problem solving and creativity** |

This is an important part of the role. The post holder is required to deal with day to day problems such as managing workloads, deployment of personnel, deployment of resources in case of emergency, and prioritisation of tasks. The post holder will also be required to solve problems such as strategic financial planning and external fundraising.

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| **Key contacts and relationships** |

* Daily contact with Headteacher, teaching staff, pupils and parents.
* Daily contact with direct reportees, including Facilities’ Manager, Network Manager and finance staff.
* Regular contact with Governors, contractors and suppliers.
* Other contacts with DfE officials, community groups, and external funding bodies.

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| **Decision making** |

Examples include

* Staffing deployment decisions within the support teams.
* Deciding appropriate contractors to recommend to the Headteacher.
* Monitoring capitation spending,
* Decide appropriate strategies to support budget holders
* Determine intervention triggers.
* Recommend financial decisions to obtain best value for money.
* Advise the Headteacher/Governing Body on financial and legal matters relating to the future direction of the school.

**Flexibility**

As a small school it is essential that all staff accept the need to act in a flexible way with the objective of overcoming new or unexpected problems in a practical way. The job description should be clearly seen as a framework and the post will be required to perform other tasks as may reasonably be requested by the Headteacher.

**PERSON SPECIFICATION**

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| ***QUALIFICATIONS*** | **Source of Evidence** | **Essential/Desirable** |
| * A relevant professional qualification in finance/business management (e.g. ACCA or CIMA) | A, I | D |
| * Evidence of relevant and continuous professional development | A, I | E |
| * A recognised human resources management qualification | A, I | D |
| * Driving Licence | A, I | D |
| **EXPERIENCE** | **Source of Evidence** | **Essential/Desirable** |
| * At least 3 years in a leadership and management role * A least 3 years in a finance role | A, I, R  A, I, R | E  E |
| * Experience of performance management responsibilities and operation | A, I | E |
| * Experience of managing projects | A, I, R | E |
| * Experience of people management * Experience of working with a variety of external partners | A, I, R  A, I, R | E  E |
| * Experience of designing, developing and introducing new systems and operating procedures | A, I, R | D |
| * Experience of premises management | A, I, R | D |
| * Experience of fund raising | A, I | D |
| * Awareness of current education issues and developments | A, I | D |
| * Experience of Human Resources * Experience of developing staff through quality Continuous Professional Development and coaching | A, I  A, I | D  D |

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| **SKILLS AND ABILITIES** | **Source of Evidence** | **Essential/Desirable** |
| * A highly motivated team leader who is approachable and promotes positive relationships | A, I, R | E |
| * A proven track record as a leader and manager | A, I, R | E |
| * Excellent organisational skills including ability to prioritise and meet deadlines | A, I, R | E |
| * Ability to cope with the pressures of a demanding leadership position * A self-starter with ability to work independently | A, I, R  A, I | E  E |
| * Ability to communicate orally and in writing to a wide range of audiences | A, I, R | E |
| * Proficiency in the use of Excel | A, I | E |
| * Ability to set and maintain high standards | A, I | E |
| * Ability to design new initiatives and to lead and manage their implementation to a successful conclusion | A, I, R | E |
| **OTHER** | **Source of Evidence** | **Essential/Desirable** |
| * Commitment to working in a ‘human scale’ comprehensive school based on cooperative principals | A, I | E |
| * Commitment to develop partnerships between the school and the community | A, I | E |
| * Commitment to working with governors and parents | A, I | E |
| * High expectations of self, staff and students | A, I | E |

**Key: A = Application, I = Interview, R = References, E = Essential, D = Desirable**