



# Job Description

## Bursar

The Bursar is a member of the Senior Management Team and Clerk to the Governors. The Bursar with an Assistant Bursar and further admin support is responsible for the financial and operational management of the school and its premises and is accountable to the Head Teacher and the Governors. The Bursar line manages an accounts and admin team, the Catering Manager, the Estates Manager and the Domestic Services Manager. The roles and responsibilities listed below are carried out with the support from this team. All members of staff are welcomed into the St David's College community and are encouraged to engage in events that celebrate the community. The School is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment.

This job description may be modified by the Headmaster, with your agreement, to reflect or anticipate significant changes in the job, commensurate with the salary and job title.

**Responsible to:** Headmaster and Governing Body

**Role commencing:** January 2017 or as soon as possible thereafter.

## Strategic role

### Resources

#### **1.1 Strategic planning**

Ensure the school makes the best possible use of resources through effective strategic planning, including consideration of all financial implications. Produce timely and fully costed proposals and ensuring they are sustainable, for example, through five-year budgets. Understand the effects and implications of government policies, legislation and directives and develop effective strategies for current initiatives and long-term educational trends and developments.

### Management

#### **1.2 Finance, human resources, estate management, administration and training**

Manage all or the majority of the disciplines of finance, human resource management, ICT, estate management, whole-school administration and marketing. This to include all general training and development of staff, and all matters within the management of the school which are supportive to, but do not involve, the teaching function. Ensure maximum efficiency and cohesive approach, for example, by involving all staff in bringing together management and curriculum networks.

### Risk management

#### **1.3 Health and safety, environmental issues, and service contracts**

Ensure effective risk management, for example, in health and safety and in the management of any third-party service contracts. Develop a disaster recovery strategy to include a detailed plan. Negotiate, manage and monitor contracts, tenders and agreements ensuring 'best value' at all times. Manage all aspects of school business management in a sustainable and eco-friendly manner.

# Finance

## Resource management

### **2.1 Managing and monitoring budgets and payroll**

- 2.1a Prepare for approval by the Head Teacher and governors the annual estimates of income and expenditure. Obtain agreement of budgets, and monitor accounts against budgets. Prepare regular management accounts for budget holders and report on the financial state of the school to the governors.
- 2.1b Advise the Head Teacher and governors on investment and financial policy, preparing appraisals for particular projects and developing a business plan (long-term financial strategy) for the future development of the school.
- 2.1c Ensure compliance with relevant financial standards, including filing details as required with Companies House. Use financial management information, especially benchmarking tools, to identify areas of relative spending, assess trends and directly advise the SMT accordingly.
- 2.1d Manage the school accounting function, ensuring efficient operation according to agreed procedures, and maintain those procedures by conducting at least an annual review.
- 2.1e Monitor all accounting procedures and resolve any problems, including:
  - (i) ordering, processing and payment for all goods and services provided to the school
  - (ii) operation of all bank accounts, ensuring that a full reconciliation is undertaken at least once per month
  - (iii) maintaining an assets register, and
  - (iv) preparation of invoices and collection of fees and other dues, taking legal action where necessary to recover bad debts.
- 2.1f Prepare the final accounts and liaise with the auditors. Provide detailed management accounts for the governors and Head Teacher according to an agreed schedule, reporting immediately any exceptional problems.
- 2.1g Provide a comprehensive payroll service for all school staff, including operation of the various pension schemes and other deductions in which the school participates.
- 2.1h Prepare all financial returns for the central and local government agencies within statutory deadlines.
- 2.1i Deal with the school's rating assessment and VAT liabilities, and advise on the financial implications of charitable status with respect to the current and any future tax legislation.

## Resource management

### **2.2 Managing cash**

Maximise income generation within the ethos of the school. Ensure best value principals are adopted, for example, in extended schools activities.

### **2.3 Securing funds to which the school is entitled**

Act as point of contact with central and other agencies with regard to grant applications, gifts and other donations.

## Bids/service contracts

### **2.4 Securing bid-based competitive funds**

Secure bid-based competitive funds by effective use of bidding systems and contacts.

### **2.5 Managing contract services (such as catering and cleaning)**

- 2.5a Negotiate, manage and monitor contracts, tenders, and agreements for the provision of support services.

Purchase, either directly or indirectly, the school's energy supplies.

- 2.5b Arrange school facilities to include:
- (i) catering
  - (ii) transport, including minibuses and drivers
  - (iii) school shop
  - (iv) bookings for school facilities, and
  - (v) provision of facilities for additional tuition out of school hours.

**2.6 Buying and managing insurance (including supply teacher cover)**

- 2.6a Seek professional advice on insurance and advise the governors on the appropriate insurances for the school. Implement the approved insurances, and handle any claims that arise.

**Developing sponsorship links**

**2.7 Securing sponsorship funding using commercial flair**

- 2.7a Act as an articulate ambassador to develop contacts and raise school profile.

## **Human resources**

**Personnel issues, support staff management and development**

**3.1 Recruiting and managing support staff**

- 3.1a Responsible for general personnel matters including employment clearance for new staff (medical checks, child protection) and issuing contracts of employment. Advise governors on assessment of salaries, expenses, sickness and maternity procedures, redundancy and other matters of dismissal. Attend employment tribunals as necessary. Maintain confidential staff records and ensure that staff records held in the school by others are kept confidential.
- 3.1b Provide leadership and guidance for support staff, including direct line management responsibility where appropriate - administrative and clerical, financial, technicians, medical, welfare and teaching assistants, premises and maintenance, ground staff, cleaners and caterers.
- 3.1c Manage the recruitment, professional development, appraisal and training of all support staff.
- 3.1d Plan for, arrange and report on staff development aspects for all staff.

**Contracts administration - managing employment contracts**

**3.2 Managing all staff employment contracts and the administration related to staff recruitment**

Oversee all staff contracts and coordinate the administration of staff recruitment.

**Advising on employment law**

**3.3 Providing advice on employment law issues**

- 3.3a Advise governors on the policy needed to comply with legislation concerning employment protection, equal pay, sex discrimination etc, and the implementation of these policies in school.
- 3.3b Formulate, monitor and implement the school's safety policy to comply with the requirements of Health and Safety at Work Act and other legislation.
- 3.3c Act as the school's health and safety coordinator and fire officer.

# **Estate management**

## **Premises, health and safety management**

### **4.1 Managing the premises (as line manager of the Estates Manager)**

- 4.1a Manage the maintenance of the school site and buildings, the preparation of maintenance schedules and the efficient operation of all facilities on the property. In addition oversee plant for lighting, heating, domestic hot water, cooking, ventilation, water softening, energy conservation, etc.
- 4.1b In cooperation with the Fire Officer and fire service, manage the installation and maintenance of equipment for protection against, and escape from, fire. Initiate and keep records of regular fire practices and alarm tests. Ensure emergency procedures are current and timely.
- 4.1c Manage the security of the school site.
- 4.1d Manage the upkeep of playing fields, gardens, all-weather surfaces, tennis courts and land drainage. Ensure the maintenance of boundaries, footpaths, roads and rights of way.
- 4.1e Purchase, repair and maintain all furniture and fittings.

### **4.2 Managing health and safety**

- 4.2a Know about health and safety regulations, particularly the main issues specific to the school and how they relate to students, staff, visitors, contractors and other users of school premises and facilities.
- 4.2b Know the elements of fire safety and the associated risks to the school through the process of risk assessment.

## **Letting, risk assessment**

### **4.3 Maximising income from lettings and extended school services**

Manage the letting of the school premises to outside organisations and school staff, and the development of extended schools activities, with particular reference to the local community.

### **4.4 Devising premises strategy, overseeing services and contracts management**

Acquire and dispose of land and buildings as authorised by the Head Teacher and governing body. Draw up outline specifications for new buildings, obtaining tenders, obtaining planning permission, and liaising with building contractors and the school architect.

### **4.5 Assessing risks and identifying hazards**

- 4.5a Know about risk assessment tools and how to use them to establish hazards within the school and the associated risk involved.
- 4.5b Be aware of the importance of a disaster recovery plan and its place within the management procedures of the school.

## **Loss-prevention strategies**

### **4.6 Implementing risk assessment and loss-prevention strategies**

- 4.6a Know the elements of a comprehensive disaster and recovery plan and operate the elements linked to the resource management responsibility.
- 4.6b Implement risk management and loss prevention strategies in the school to reduce insurance costs.

# **Whole-school administration**

## **Improving school ICT systems, facilities and communications**

### **ICT management**

- 5.1 Managing ICT, including purchasing and contracts.  
Liaising with LA/DfES/feeder schools.**
- 5.1a Manage the administrative function including the administrative ICT facilities, school reception, reprographics, records and telephones.
- 5.1b Manage the school's administrative and financial computer network systems; the implementation of appropriate management information systems; and the full computerisation of the administration accounting and record system, including desktop publishing. Act as system manager for the administrative computer network and curriculum network if appropriate.
- 5.1c Provide for the preparation and production of all school records and publications.
- 5.1d Maintain pupil records including those for the assessment process. Analyse the data and, in conjunction with teaching colleagues, form strategies to address specific issues.
- 5.1e Act as correspondent for the DfES and be responsible for the records and returns required.
- 5.1f Obtain the necessary licences and permissions, and ensure their relevance and timeliness.

## **Improving school policies and staff relationships**

### **Admissions**

#### **5.2 Advising the Head Teacher and governors on admissions**

Advise the Head Teacher and governors on the need for admissions and appeals policy; and develop a school admissions and appeals policy.

### **Relationship management**

#### **5.3 Managing relationships (teachers/support staff/contractors)**

Act as a bridge to facilitate closer working relationships between teaching and support staff; and develop school policies for working with contractors and outside agencies.

# **Marketing and liaison**

## **Improving school links to the local community**

### **Promoting the school**

#### **6.1 Promoting the school to parents, partners and the local community**

Promote the school to different audiences and raise the profile within the local community.

### **Links to other schools/agencies**

#### **6.2 Liaising with other local schools and outside agencies**

Ensuring effective liaison with other schools. For example by linking to a learning network and accessing training on a group basis to reduce costs and/or improve accessibility.

## **Business community links**

### **6.3 Liaising with local businesses**

Liaise with local businesses for fundraising, arranging vocational experience and joint projects.

## **Safeguarding**

### **7.1 Safeguarding Children**

Promoting and safeguarding the welfare of children and young persons for who you are responsible and with whom you come into contact.