



## Bursar & Estate Manager Job Description

<b>Job Title:</b>	<b>Bursar</b>
<b>Salary:</b>	<b>Negotiable and depends on experience</b>
<b>Status:</b>	<b>Full time permanent contract</b>
<b>Reports to:</b>	<b>Headmaster/the Board of Governors</b>
<b>Direct Reports:</b>	<b>Maintenance/Groundsmen/Housekeeper/Book-keeper</b>

### Belhaven Hill School

Belhaven Hill is special. Known simply as 'Belhaven', its small size allows for a warm, fun environment in which children achieve outstanding results academically and in a host of other areas. The Bursar is at the heart of school life and is key to operations running smoothly.

Belhaven is a co-educational prep school, with a unique atmosphere and ethos. It has a roll in excess of 100 pupils, aged between 7 and 13. Founded in 1923 as a boys' boarding school, it has been genuinely co-ed since 1995. Over the last ten years, while other schools in the north have closed or reduced their boarding to weekly or flexi-boarding provision, Belhaven has grown in size and strength and remains a 'full-boarding' school, which welcomes day pupils. Almost all the children board for the last two to three years at the school. Pupils board on a fortnightly cycle, where they go home every two weeks from Friday lunchtime/afternoon until Sunday evening or Monday morning.

The main school building is a handsome listed mansion, dating from 1760. Five large rooms and an additional storey were added in 1900 and there have been further extensions in recent years. Boys have their dormitories in the main building and there is a separate girls' house across the lawn. There are resident Heads of both Boys' and Girls' Boarding. The girls' house has evolved since the turn of the century and is particularly warm, comfortable and welcoming. The main house has undergone a programme of refurbishment and redecoration in recent years to make the boys' boarding house a home from home; enhancing dormitories and bathrooms and creating a boarders' kitchen common room. A new classroom block, music school and art building have all been created since 2000. Many of the staff live within the lovely grounds which extend to 20 acres, with accommodation in either the old stable block or the south lodge. There are fine playing fields, a small astroturf pitch, a sports hall, a heated outdoor swimming pool, grass tennis courts, a croquet lawn, putting green and children's gardens within the walled garden. Between the rear of the school and the sea is a golf club, of which the senior children can become members, allowing them to play rounds in the evenings and at weekends. The ex-

tensive Belhaven Bay beach, within the John Muir Country Park, is a short walk from the School and popular for surfing.

The school is a charitable trust run by a Board of Governors. The Bursar reports to the Head and the Governors and attends meetings of the full Board and its sub-committees. As Belhaven approaches its Centenary in 2023, the School has begun to implement a new Strategic Plan, drawn up in partnership with the Head and supported by the staff. This includes some exciting and innovative projects to which it is hoped the new Bursar will contribute.

Children are prepared for entry to a wide variety of boarding Public Schools through either Scholarship or Common Entrance. These include schools such as Ampleforth, Eton, Fettes, Glenalmond, Harrow, Oundle, Queen Margaret's, Radley, Rugby, Strathallan, Tudor Hall and Uppingham.

## **Purpose of Role:**

The primary purpose of this role is to provide robust and compliant financial management of Belhaven School for the Headmaster and Board of Governors in order for the effective management of finances and related projects. As Estate Manager the Bursar is also responsible for the line management of the non-academic support services that are essential for the effective management of the school facilities. The Bursar is the School's Data Protection Officer. The Bursar is supported by a part-time book-keeper.

## **Responsibilities:**

### **Finance and accountancy - including fee billing and Payroll**

- Advising on general financial policy and warning of any financial risk for the School
- Production, analysis and audit of regular management accounts and Annual Accounts, in liaison with the School auditors and in accordance with the Charities' Statement of Recommended Practice (SORP)
- Preparing financial appraisals of particular projects, particularly in reference to the work of the School's Centenary Appeal
- Preparing long-term assessments of the future financial performance of the School
- Financial planning including business plans, budgets and forecasts usually for a period of five years
- Liaising with the Headmaster in relation to the financial/commercial aspects of the School's Strategic Plan and Key Performance Indicators
- Monitoring and maintaining cash flow projections and apprising the Headmaster and Governors of the cash flow position
- Advising on the financial implications of the charitable status of the School seeking advice from the School's professional advisers if necessary
- Taking responsibility for the IT/ Financial systems to ensure efficient and accurate management of data and processing
- Management of all income and expenditure
- Monitoring and authorisation of expenditure allocated through budgets
- Production of termly management accounts
- Management of school bank accounts and reconciliation with computer accounts
- Overseeing the School's procurement procedures and ensuring compliance with the Procurement policy for all major contracts
- Managing the School's charitable contributions and reporting to the Board of Governors on the School's annual charitable initiatives

- Analyses of costs and other statistical records to ensure efficient use of resources

### Parental billing

- Issuing and collecting bills for fees and extras, adjusting for bursaries and discounts as appropriate, and chasing outstanding invoices
- Overseeing bursarial award applications and managing the application process (assessment of awards is done by independent advisors, who report to the Bursar.)
- Managing any discrete bursary funds
- Operation of a composition (advance) fees scheme
- Being the point of contact for parents in relation to fees and payment of fees

### Salaries and wages

- Implementation of salary/wage levels and increases
- Administration of PAYE, National Insurance contributions and superannuation. Compliance with regulations for benefits in kind
- Administration of staff pension schemes
- Overseeing and ensuring the accurate management of the School's payroll, which is administered by external advisers.

### Human Resources

- Responsibility for Human Resources throughout the School, including contracts of employment and statutory matters
- Liaising with the School's professional HR advisers to ensure compliance in employment matters
- Overseeing the staff licences to occupy School accommodation
- Ensuring that the School is compliant with the requirements of HMRC as an employer

### Belhaven Centenary Fund

- Managing the funds raised by the School for the Centenary Fund
- Evaluating and making recommendations on capital projects
- Ensuring that restricted funds are properly recorded and managed
- Working with the School's Development Officer to ensure that donations are properly managed

### Clerk to the Governors

- Responsibility as Clerk to the Governors and secretary to committees if required
- Organising meetings, including venues, agendas, conduct of meetings and minute taking
- Acting as Company Secretary for the School Trust
- Producing governance papers as required and in a timely manner in advance of meetings
- **Minutes:**
  - Recording attendance at meetings and taking contemporaneous notes in order to prepare minutes.
  - Ensuring that minutes are an accurate record of discussions, decisions and actions to be taken.

- o Circulating the minutes for approval to the Chairs of Governors within seven days of meetings
- o Keep copies of minutes of all Board meetings securely as an archived record
- Administering the induction process and registration of new Governors
- Maintaining and managing the Register of Interests of the Board of Governors, the Matrix for review of policies and procedures, the Governance Calendar
- Managing a database of names, addresses, professions, category of governing body membership and their term of office
- Maintaining copies of current terms of reference and membership of committees
- Ensure that a Disclosure Scotland Protection of Vulnerable Groups (PVG) check is conducted for all new appointees and any reappointments to the Board
- Maintain archive materials and records in line with current legislative requirements
- Such other reasonable financial and/or administrative tasks as may be required from time to time by the Governors

### Professional Development

- Keep up to date with current educational developments and legislation affecting independent school governance.
- Participate in professional development opportunities.

### Line Management - Buildings, grounds and maintenance

*To manage the facilities and maintenance team on all planned maintenance and capital projects / expenditure*

- Responsibility for the completion and review of all risk assessments
- Advising the Headmaster and Governors on major projects and their financial implications
- Setting and managing budgets of planned maintenance and capital projects
- Overseeing the maintenance and security of all School properties
- Supervision of maintenance and grounds staff, including any external contractors
- Overseeing the upkeep of the School gardens, playing fields, tennis courts, astroturf and swimming pool and associated plant
- Monitoring costs regarding utilities, purchase of furniture, fittings and materials
- Liaising with architects, builders, tradesmen on new constructions/repairs of existing buildings and facilities
- Obtaining tenders, planning permission etc
- Overseeing maintenance of school minibuses, maintenance tools and equipment, insurance, tax etc.
- Arranging for staff accommodation and preparing necessary leases, licenses, etc.
- Ensuring the school buildings, premises and facilities comply with all current statutory legislation including fire, health and safety, etc.

### Line Management - Domestic Facilities

- Acting as line manager for all domestic staff and in liaison with the Housekeeper providing guidance and advice as necessary to enable them to perform their duties
- Acting as principal point of contact for the School's outsourced caterer
- Assessing, appraising, guiding, supporting and encouraging continual professional development of all staff for whom he/she is responsible and ensuring that all staff have

access to advice and training appropriate to their needs, in accordance with the policies of the Headmaster

- Ensuring, with the Head, the compliance of all staff with the School's Policies and Procedures with regard to the content of the Staff Handbook and legislation in respect of employment law and health and safety law at work

## School lets

*To take responsibility for the commercial letting of school facilities and to develop the possibility of further income generation from school assets*

- Organising and overseeing all lets of School buildings and facilities during School holidays, particularly summer residential lets to ensure good returns
- Developing commercial lets

## General administration

- Liaising with the School's Health and Safety Officer to ensure effective compliance and proper allocation of budgeted funds
- Acting as the School's Data Protection Officer and overseeing the training of staff in data protection matters and ensuring compliance with national data protection law, seeking advice from the School's professional advisers where necessary
- Responsibility for all aspects of the School's insurance cover, rates, council tax and utilities

## Candidate Profile

- Experience working in a similar environment
- Educated to degree level or experience equivalent
- Preferred Qualified Accountant
  - Leadership - the vision, energy and ability to run the School's finance department
  - Team-player - a positive and enthusiastic attitude and a proven ability to work as part of a team
  - Outstanding interpersonal skills - a demonstrable ability to build rapport and communicate persuasively with prospective parents, parents, staff and pupils from diverse backgrounds
  - A customer-focused approach to engaging with families and understanding their particular needs and priorities
  - Communication - the ability to write and speak in a clear, convincing and persuasive way. A warm and polite manner on the telephone and in person is essential.
  - Intelligence - the ability to take a strategic view and communicate it clearly. The ability to act as an ambassador for the School and the educational values it represents.
  - Creativity - the ability to assess and adapt to new and changing situations and to change strategy to suit them
  - Reliability and Resilience - Attention to detail, deadlines and budgets. Persistence, prioritisation and perseverance in achieving agreed goals and targets.
  - Digital literacy - competence in standard office software (word-processing, presentation and spreadsheet packages.) Ability to use and interpret databases.
  - Professionalism - a knowledge of Data Protection law and its application to the management of sensitive personal data acquired by the School. The ability to maintain confidentiality and a high degree of integrity at all times.

- A genuine desire to work to support Belhaven's future and enable its charitable objectives

This is an exceptional opportunity to help lead a successful and ambitious school whilst enjoying a very high quality of life in the beautiful setting of Belhaven.

The School is committed to safeguarding and promoting the wellbeing of children and young people and expects all staff to share this commitment. A copy of the School's Safeguarding and Child Protection Policy is available for download from the School's website [www.belhavenhill.com](http://www.belhavenhill.com) . Please take the time to read this document.

It is the policy of this School to employ the best qualified personnel and to provide equal opportunity for the advancement of employees including promotion and training and not to discriminate against any person because of their race, colour, national or ethnic origin, sex, sexual orientation, marital or civil partnership status, religion or religious belief, disability or age. All new appointments are subject to a probationary period.