



Bursar Job Description

Responsible to: The Head

Job Purpose:

- To lead all non-academic aspects of school life, contributing to strategic vision and leading on the strategy as directed by the Governors, as well as ensuring a strong financial base from which the school can effect ongoing improvements to its outstanding educational provision.
- To manage the school's non-academic staff, finances, premises, facilities and to oversee risk management, advising the Head and Governors on key strategies, policies and decisions in these areas.
- To play a central role in commercial decision making, in conjunction with the Head and the Senior Leadership Team (SLT).
- To promote the highest standards of financial probity and value for money within the school.

Specific Areas of Responsibility:

1. Strategic Direction and Development:

- To provide key information, financial analysis and critical thinking to support the strategic decision making of the Head and Governing Body of Kingswood House School;
- To contribute to the development of the Strategic Plan and to take responsibility for implementing appropriately delegated aspects;
- To develop and maintain a strategic financial plan, advising the Governing Body well in advance of trends and to lead the preparation of forward budgets and forecasts.

2. Financial Resource Management and Reporting:

- To lead the annual budget process in consultation with the Head;
- To prepare termly financial reports for presentation to the Governors, Head and the Senior Leadership team and monitor reports for all budget holders;
- To closely monitor the school's cash position and maintain cash flow forecasts;
- To oversee the monthly payroll for all school staff and to oversee communications with the outsourced payroll pension providers;
- To oversee the preparation by the finance team of all fee and sundry invoices and the collection of fees and other dues;
- To ensure the school receives value for money, including seeking a range of quotes when tendering contracts;
- To use and promote appropriate benchmarking exercises in order to monitor the school's position relative to its peers.

3. Accounting and Governance:

- To prepare reports for the termly Finance Committee of the Governing Body, identifying forecast income and expenditure outturns, cash flow forecasts and variances requiring prompt corrective action;
- To prepare the Annual Report and Financial Statements for the school in line with the statutory financial reporting requirements;
- To maintain and improve appropriate financial systems and work with staff to ensure compliance;
- To ensure the school's finance policies and procedures for recording financial transactions operate in accordance with statutory guidelines, Companies House and Charity Commission financial regulations;
- In conjunction with the Finance Manager, to devise appropriate accounting procedures to ensure the effective operation of financial controls within the school including the management of school assets;
- To prepare and maintain the school's Risk Register. This will involve a review and statement of internal controls at least annually;
- Arrange appropriate insurance cover on an annual basis.
- To advise Governors and the Head on external and internal audit requirements and coordinate all audit requirements together with the School Accountant;
- To ensure that tax obligations are discharged correctly and effectively;
- To operate as Clerk to the Governors and Company Secretary of Kingswood House School.

4. Income Generation:

- To work with the Senior Leadership team and Admin Team to maximise income generation and financial growth;
- To identify potential funding opportunities for current activities or new ventures from charitable grants, government initiatives and similar opportunities;
- To oversee the letting of school premises to external organisations and groups, considering the safeguarding elements of doing so as well as the financial returns generated.

5. Facility & Property Management:

- To progress, in consultation with the Head, the School's Estate Strategy;
- To plan and project manage all major construction projects, using external advisors where necessary and with the assistance of the estates staff on operational matters;
- To ensure the safe maintenance and security operation of all school premises, the day to day responsibility being delegated to the estates staff;
- To ensure a safe environment for all stakeholders of the school to provide a secure environment in which educational processes can be provided;
- To consult with the Head to develop a programme of capital improvements, planned maintenance, decoration, security and cleaning.

6. Health and Safety

- To promote and develop a culture of active and positive health and safety in the school;
- Oversee the Health & Safety Officer, delegating day-to-day duties;
- Schedule the provision of Health and Safety training to all staff;
- Advise on and implement security measures within the school to ensure the safety of staff and pupils, and protection of buildings and equipment;
- Ensure the school complies with all relevant legislation;

- Ensure regulatory compliance is upheld by the school in order to meet ISI Regulations.

7. Management Information Systems & ICT:

- To work with the Senior Leadership Team and the IT Manager to develop and implement the IT Strategy, optimising usage of the Management Information System and maximising the resilience of the IT infrastructure;
- To ensure contingency plans and information back-up systems are in place in the case of technology failure;
- To coordinate responses to subject access requests;
- Work with the School's Compliance Officer, ensuring compliance with relevant data protection legislation.

8. Human Resources:

- To line manage the Compliance Manager and work with the Head on HR and recruitment matters;
- To ensure recruitment and employment policies are in place and comply with Safer Recruitment best practice;
- To ensure all staff have contracts of employment and the school complies with employment status legislation.

9. Administration, Catering and Housekeeping:

- To line manage the School Secretary and Administrative Assistant;
- To manage the in-house catering provision, focussing on the level of service and value for money;
- Oversee the outsourced cleaning contracts, focussing on the level of service and value for money;
- Hold regular review meetings with the service providers to monitor performance against service and financial targets;
- Benchmark outsourced services against comparable service providers and in-sourced provision and re-tender where appropriate.

10. Other:

- To be a member of the School's Senior Leadership Team;
- To develop and update relevant school policies and to be present where required at meetings, performances and other functions / events;
- To run appraisal, performance and line management systems for administrative and support staff;
- To undertake specific tasks reasonably delegated by the Head from time to time.

Bursar Person Specification

QUALIFICATIONS: (ideally will possess at least one or more of the following)

- A recognised and relevant accounting qualification
- Hold a Certificate or Diploma from the National College for School Leadership.
- Diploma in Business Administration
- Master of Business Administration
- Membership of the Institute of Leadership & Management
- Membership of the Chartered Institute of Personnel & Development
- Membership of the Chartered Institute of Marketing.

EXPERIENCE: (ideally will include many of the following)

- Good working knowledge of financial and accounting procedures
- Knowledge of financial software packages and database structures
- An understanding of how an independent school works and its financial implications.
- Previous Bursar experience is desirable but not essential
- Experience of contracts management
- Experience of securing special grant/sponsorship/income generating activities
- Proven experience of working in an organisation with a diverse range of functions and multiple stakeholders
- Knowledge of Employment Law
- Knowledge of Health and Safety/risk assessment regulations and procedures
- Knowledge of the regulatory framework applicable to independent school's education
- Experience of working with the Independent Schools' Bursars Association (ISBA)
- Knowledge of Children and/or vulnerable adults' safeguarding requirements
- Proven experience of managing a team.

SKILLS AND ABILITIES:

- Ability to devise and introduce new procedures and systems
- Ability to work under pressure and retain a professional composure
- Excellent communication skills both written and oral
- Good administrative and IT skills including Microsoft Excel and Word
- Excellent communicator with high levels of initiative
- Ability to plan strategically.

PROBLEM SOLVING/DECISION MAKING:

- Ability to generate solutions/new ideas that deal effectively with problems
- Make well-judged high quality decisions which can be defended in front of a wider audience.

RELEVANT TRAINING: (ideally will include many of the following)

- Evidence of recent/relevant training in areas such as
 - education
 - business management
 - safeguarding
 - health & safety
 - safer recruitment

- child safeguarding
- Must be keen and willing to undertake future relevant training.

PERSONAL QUALITIES:

- Demonstrates good business acumen
- Highly motivated, maintains high standards
- Need to be a proven motivator of staff
- Need to be a strong team player
- Good sense of humour
- Able to organise own work and supervise the work of others
- Able to get things done correctly and on time with minimal direction
- Able to impress those around him or her with a sense of purpose and commitment to the organisation
- A 'can do' attitude
- Highly flexible in addressing evolving and changing priorities and hours of work
- A commitment to championing the charitable aims and vision of a dynamic, caring and ambitious prep school.

September 2024