



# Bursar

## Candidate Brochure

THE ELMS  
EST 1614



## Chair's Welcome

Thank you for your interest in our fantastic school.

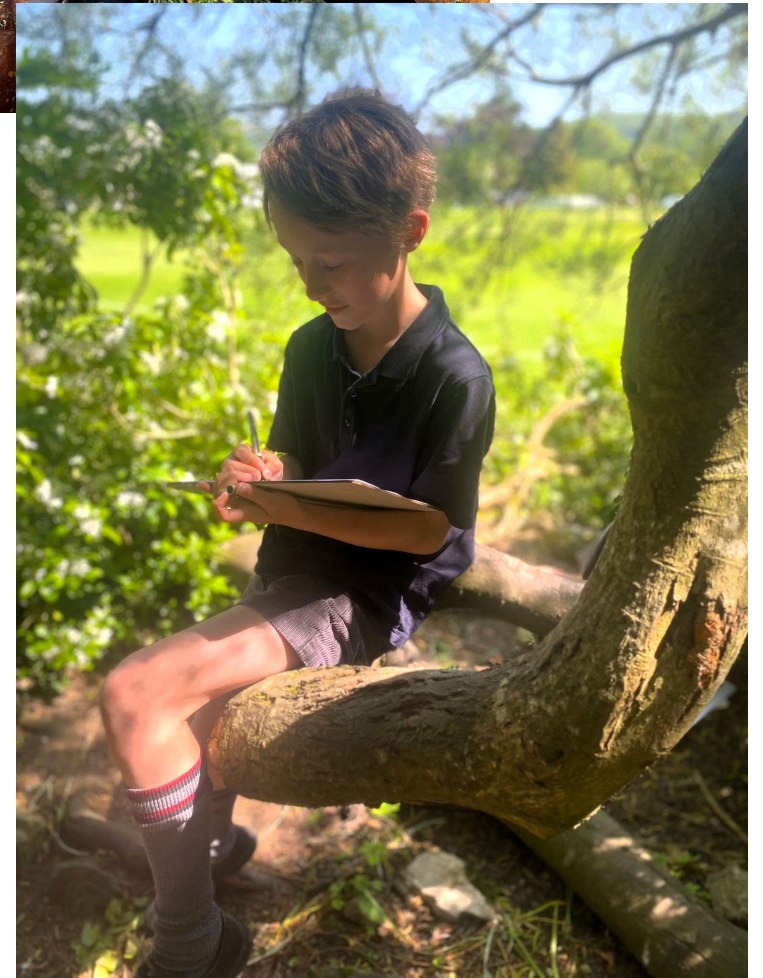
The Elms has a claim to being the oldest preparatory school in England still on its original site and, if you visit, you may understand why it has resisted any move from its home in the Malvern Hills Area of Outstanding Natural Beauty. The site informs the education - we are rooted in our community and attach great importance to co-curricular activities such as rural studies - while providing an education that is relevant to the needs of modern life.

We are proudly independent of any senior school. Our leavers go on to a wide range of outstanding destinations that best suit them and these schools tend to cherish our leavers for the broad characters that The Elms education has developed. We believe that independence has a value that can sustain through what are clearly difficult times.

The school was recently recapitalised and, under new management, has anticipated the financial challenges for parents such that we are able to view the coming years with cautious confidence, though never complacency. These are interesting times and there may be opportunities.

We look forward to finding a candidate who can bring their skills to bear, alongside ours, in executing our mission to deliver the sustainably strong operating platform that allows our school to thrive

**Mr James Rose**  
**Chairman of Governors**





## From the Chair of the Finance Committee

I am privileged that my role entails a strategic reporting line direct from the Bursar and I look forward to welcoming the successful candidate to The Elms.

The school underwent a restructuring of its Board of Governors in 2022 accompanied by a highly successful recapitalisation.

As a result of the subsequent programme of reforms and the appointment of new Senior Leadership, the school's financial performance has improved markedly. After a prolonged period of historic cash consumption the school has returned to being operationally cash generative, two years ahead of plan.

The Elms is debt-free with significant free reserves. In addition to this excess liquidity, the school has substantial and unencumbered property assets.

I look forward to seeing the successful candidate embrace the opportunity to build upon this foundation and shape the development of this historic school.



**Dan Graham**  
Chair of Finance Committee



## Welcome from the Headmaster

Thank you for your interest in the role of Bursar. The Elms is a truly special place, steeped in over 400 years of history and tradition, and the role of Bursar is pivotal to our continued success.

In exploring the role and the school, I hope that you get a sense for our ethos and character. We are very much a 'greenhouse' rather than a 'hothouse'. We encourage every pupil to be the very best version of themselves in all they do, whilst at the same time ensuring that they can enjoy all the best aspects of childhood.

We seek to recruit the very best staff, and I could not be prouder of our committed team. We have high expectations, but in return we provide a supportive and friendly working environment and generous benefits. Our Senior Leadership Team and Governing Board embody our ethos and have ambitious aspirations for the school. The Bursar is a crucial member of the SLT that oversees the strategic and operational running of the school, and I regard an outstanding working relationship between Head and Bursar as the keystone of any successful independent school.

This candidate pack will give you a good overview of the position, and some valuable insights into working at our School. Do also look at our website, to gain an overview of our values and vision, and to get a sense of what we strive to achieve.

I hope to have the pleasure of meeting you soon and welcoming you to The Elms.

**Ed Lyddon**  
Headmaster



# Job Description

## Summary of role

The Bursar will be responsible for all matters relating to Finance, Human Resources, Estate Management, Legal, Compliance, Health & Safety and will act as Company Secretary.

In fulfilling these responsibilities, the Bursar will be directly supported by the school's Business Manager and Estates Technician.

The Bursar will join the Senior Leadership Team of the school with an operational reporting line direct to the Head and a governance reporting line, independent of management, direct to the Chair of the Finance Committee.

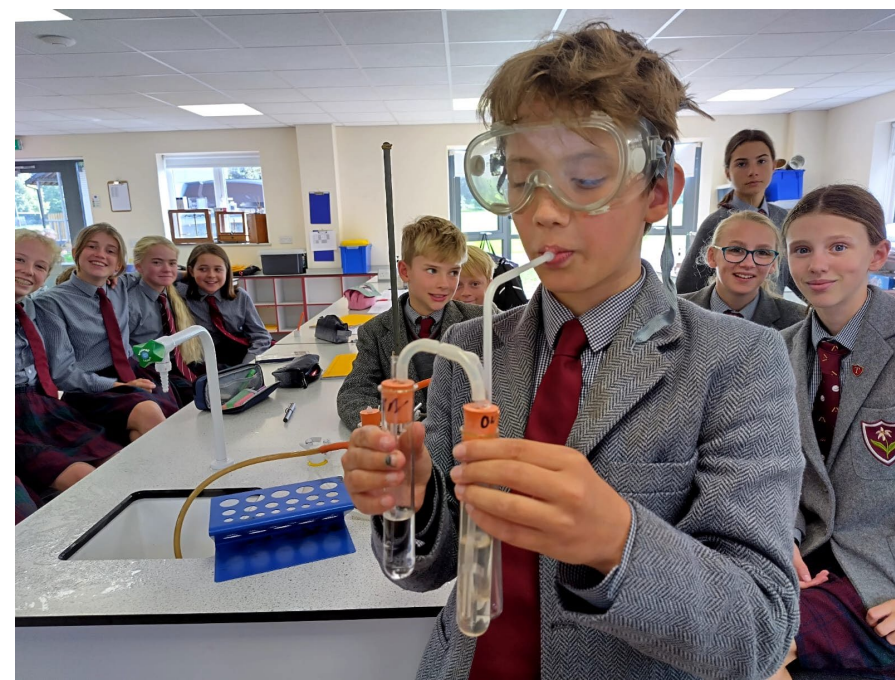
This is a full-time, year-round position. The targeted start date is September 2025 with some flexibility either side, for the right candidate.

## Responsibilities

### Finance

- Keeping the management accounts of the school
- Preparing estimates of income, expenditure and cashflow and setting departmental budgets
- Providing longer-term financial modelling and strategic planning for the school
- Identifying ways to optimise the efficiency of the school's cost base without affecting pupil experience
- Identifying ways to minimise the level of school fees to ensure they are as competitive as possible without compromising sustainability
- Managing and monitoring income and expenditure relative to budget
- Identifying any potential variances relative to budget and ensuring that the Head and Chair of the Finance Committee are promptly made aware
- Presenting termly updates to the Head and to the Board of Governors
- Preparing invoices through iSAMS for all fees and ancillary income
- Preparing and filing VAT returns and ensuring that the correct amounts of VAT are paid and reclaimed
- Close monitoring and handling of debtors to ensure timely collection of receivables

- Scrutinising and paying all invoices incurred by the school
- Negotiating to ensure best value for all procurement
- Monthly processing & reconciliation of payroll through iSAMS
- Administering pension schemes for teaching staff (APTIS) and non-teaching staff (NOW Pensions)
- Overseeing all banking matters including processing, reconciling and reporting
- Co-operating with the School's auditors in the preparation of the statutory accounts
- Advising the Board on suitable financial investments in consultation with the School's investment managers in order to maximise the return earned on the School's funds
- Maximising lettings income and other commercial income through collaboration with and supervision of the school's Business Manager
- Liaising with the school's external assessor of Bursary applications
- Maintaining a disciplined approach to the grant of allowances and Bursaries in collaboration with the Head and in accordance with the Board's bursary policy and budget



# Job Description *cont.*

## Human Resources

- Ensuring that the School is appropriately staffed and resourced
- Line manager to non-teaching staff (approximately 30 reports) with the exception of the Head's PA who reports to the Head, and the Head of Admissions & Marketing who has a dual report to the Head and Bursar
- Supporting the recruitment process for teaching and non-teaching staff, managing recruitment advertising, drawing up contracts and offer letters, obtaining references, completing all pre-employment checks and submitting checks for Board sign-off
- Supervision of the school's Business Manager to ensure all pre-employment checks and creation of files for new staff are arranged from completion in compliance with ISI guidelines and DfE regulations
- Supervision of the school's Business Manager to ensure staff absences are accurately recorded and return-to-work meetings and welfare reviews occur as and when needed
- Supervision of the school's Business Manager to ensure maintenance of all training logs for staff, ensuring courses are booked in advance of expiration dates
- Managing the employment, terms and conditions of service, supervision and welfare of all staff, including the conduct of performance reviews and appraisals for non-teaching staff, implementing performance plans and disciplinary action when necessary, conducting exit interviews with staff leavers
- Maintaining staff sickness records and managing the company sick pay scheme
- Ensuring compliance with all relevant aspects of employment law
- Ensuring HR policies and procedures including staff contracts, job descriptions, performance management, grievance and disciplinary policies are maintained up to date



# Job Description *cont.*

## Company Secretarial, Legal, Compliance, Insurance

- Overseeing the management of the Single Central Register ensuring that it is maintained accurately and up-to-date by the school's Business Manager
- Acting as Company Secretary for the limited company
- Ensuring the timely submission of returns to HMRC, Companies House and the Charities Commission
- Ensuring all practices are compliant with relevant legislation and relevant regulatory bodies
- Ensuring compliance with regulations for the operation of minibuses; licences; driver training and assessments; servicing and Vehicle Inspectorate Tests
- Supervision of the school's Business Manager to ensure digital registers of all compliance certifications are maintained up to date
- Ensuring that the school's insurance cover is adequate and kept up to date at all times
- Ensuring best value is obtained on new insurance policies
- Initiating and pursuing any insurance claims
- Ensuring all data is managed in compliance with GDPR

## Estate Management

- Co-ordinating the planning of building development including feasibility, planning, costings
- Ensuring that multiple quotes are obtained and ensuring high quality execution
- Supervision of the school's Estates Technician to ensure maintenance of the school's buildings, facilities and vehicles, the preparation of maintenance schedules and keeping of records
- Managing and monitoring Estates expenditure relative to budget
- Identifying any potential variances relative to budget and ensuring that the Head, the Chair of the Finance Committee and the Chair of the Estates Committee are promptly made aware



# Job Description *cont.*

## Health & Safety

- Ensuring compliance with Health & Safety regulations, Risk Management and Fire Safety Regulations
- Undertaking the annual review of whole school risk assessments
- Implementing and monitoring of all associated policies
- Conducting Fire risk assessments across all buildings and updating fire policies accordingly
- Supervision of the school's Estates Technician to ensure the conduct of testing and inspection, to agreed schedules, of Asbestos, Legionella, fire safety equipment, emergency lighting, safety systems and security systems.
- Carrying out testing, to the agreed schedule, of swimming pool water quality and temperature, fire safety equipment, emergency lighting, alarms
- Ensuring training is kept up-to-date to comply with health and safety requirements
- Reviewing and acting on accident reports and safeguarding reports



## Job Description *cont.*

The duties outlined above are not intended to be an exhaustive list and may be altered to include other tasks that are commensurate with the role as directed by the Head or Chair of the Finance Committee.

Safeguarding Children in accordance with the School's commitment to adhere to the Department for Education's Keeping Children Safe in Education and all other relevant guidance and legislation in respect of safeguarding children, the Bursar will be required to demonstrate his or her commitment to promoting and safeguarding the welfare of children and young people in the School.



# Personal Specification and Qualities

The Governing Body is seeking an inspiring, driven, and compassionate leader who can work successfully with the Governors, Headmaster and staff to further develop The Elms School.

The successful candidate will bring the following qualifications, experience, skills and knowledge, leadership style and personal attributes:

- Track record of success in finance and operations
- Demonstrable commercial acumen
- A collaborative personality
- A high standard of numeracy and attention to detail
- Accounting qualification desirable but not necessary
- Familiarity with iSAMS desirable but not necessary.
- A hands-on attitude

## Benefits

- Attractive salary
- Attractive pension contribution
- Generous staff discount on school fees
- 6 weeks' holiday per annum
- Free lunches
- Ongoing training & professional development
- Payment of membership fees for professional associations such as the ICAEW
- On-site residence available on a temporary basis to support re-location





## How to Apply

The Elms School is being assisted in the recruitment of this key appointment by the **Independent Schools' Bursars Association (ISBA)**, from whom an application pack can be obtained by sending an email to [recruiting@theisba.org.uk](mailto:recruiting@theisba.org.uk).

Alternatively, if you would like to discuss the position with ISBA prior to applying, please contact **Lucy Wyatt** on **07817 038009**.

Closing date for applications is **14<sup>th</sup> April 2025**.

Screening interviews conducted by the ISBA recruitment team will be held for long-listed candidates and short-listed candidates will attend first stage interviews and, if invited, final stage interviews at the Elms School. The ISBA reserves the right to close this position early in the event that they receive a high volume of suitable applicants.

*The Elms is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. The successful applicant will be subject to a DBS and reference check.*



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