



Job Description

Title of post: Bursar

Relationships: The Bursar is responsible to the Governing Body for the conduct of financial affairs, business management and material state of the premises and to the Headteacher for the day to day operation of the school.

The Bursar attends all Governance meetings and works with the Head and Board of Governors to develop the overall strategic direction of the School.

Fundamental Task: The post holder is responsible for providing effective, high quality leadership and management of all non-teaching tasks and services.

Responsibilities: The Bursar is responsible for all aspects of the school's non-teaching services including Finance, Estates and Facilities, Administration, Compliance, HR, IT (Operations) and Catering. The Bursar is supported by the Head of Estates and Facilities, Head of Administration and Communication, HR Manager and the Finance Assistants.

Key Responsibilities

Financial Strategy and Operation

- Develop, lead and maintain a robust financial strategy and long-term financial plan, working with the Headteacher and Board of Governors to enable the school's successful financial development and resilience.
- Monitor the school's financial position, analyse trends and compile recommendations and reports for the Headteacher and Board of Governors.
- Produce accurate and timely financial reporting, including cash flow forecast, statutory accounts and Key Performance Indicators (KPIs).
- Lead on the annual budget process in consultation with the Headteacher.
- Prepare, monitor and review annual and departmental budgets with budget holders.
- To lead and oversee the preparation by the finance team of all fee and sundry invoices and the collection of fees and other dues.
- Manage debt collection and liaise with parents and other debtors regarding outstanding accounts.
- Oversee VAT planning and compliance in light of recent HMRC changes.
- Design and implement school fee strategies that reflect market pressures, affordability and future enrolment trends.
- Ensure the school's finance policies and procedures for financial reporting of transactions operate in accordance with statutory guidelines, Companies House and Charity Commission financial regulations.



- Devise appropriate accounting procedures to ensure effective operation of financial controls within the school including the management of the school's assets.
- Manage relationships with auditors, banks and advisers, preparing all supporting documentation, lead investment and loan strategies in line with policy.
- Prepare the monthly payroll for all school staff, including PAYE, pension, National Insurance contributions and ensure compliance with regulations for benefits in kind.
- Oversee effective procurement arrangements to ensure value for money.
- Maintain a rigorous and compliant approach to the grant of allowances and bursaries in collaboration with the Head.

Estates and Infrastructure

- Oversee the maintenance and strategic development of the school estate, responding to the changing needs of the school and aligning to environmental sustainability goals.
- Lead capital planning, procurement, contract management and oversee facilities compliance.
- Ensure health and safety, fire safety, insurance and statutory inspection compliance across the sites.

Income Generation and Fundraising

- Support fundraising and commercial activity.
- Maximise and manage non-fee income opportunities through lettings, events and partnerships.
- Lead the strategic development of non-fee income streams to diversify school revenues.

Governance and Compliance

- Serve as primary financial adviser to the Board of Governors, preparing strategic reports and risk assessments.
- Prepare reports for the termly Finance, Administration and Estates Committee, identifying forecast income and expenditure outturns, cash flow forecasts and variances requiring prompt corrective action.
- Arrange appropriate insurance cover on an annual basis.
- Lead internal audit and risk management processes, including maintenance of the Risk Register.
- Lead a robust compliance control system to ensure compliance in policy and practice with all regulatory and legislative requirements including: health and safety, employment law, GDPR, ISI, Ofsted, safeguarding protocols, and fire and energy management.
- Ensure proactive compliance monitoring regarding the VAT treatment of school fees and partial exemptions.



Operational Leadership

- Support and oversee the work of all staff working in the support function of the School including:
 - the Head of Estates and Facilities including Catering
 - the Head of Communication and Administration.
 - HR Manager
 - IT (Operations)
 - Finance Assistant Staff
- Ensure the smooth and efficient running of non-teaching operations.
- Develop, support and appraise departmental leads to foster a culture of high performance and accountability.
- To oversee the outsourced catering and cleaning contracts, focussing on the level of service and value for money.

ICT and Systems

- Provide strategic oversight of operational ICT provision, including digital infrastructure, cybersecurity and MIS development.
- Champion the digital transformation of finance and operational processes.
- Oversee, in conjunction with the Head of Data and Systems, the governance and security of data management systems in line with best practice and regulatory requirements.

Human Resources and Legal Compliance

- Oversee HR policies and procedures including recruitment, retention and contracts.
- Ensure compliance with safer recruitment, employment legislation and staff development frameworks.
- Ensure SCR is up to date at all times.
- Provide strategic advice on organisational structure, remuneration and workforce planning.
- Ensure HR strategy supports staff recruitment, retention, development and operational efficiency.

Please note that this Job Description is not exhaustive and the employee may be expected to undertake additional duties if required.



Contract	Full-Time, Permanent
Hours of Work	As required to discharge the duties efficiently, conscientiously and appropriate for a management position. Normal office hours are Monday to Friday, 8.30am – 5.00pm although there will be times during the year when work outside these times will be required.
Salary	Competitive depending on qualifications and experience at time of appointment. Salaries are usually reviewed annually in September with no obligation to increase them.
Pension	Holme Grange provides access to a stakeholder pension scheme as required by law. The School will comply with its obligations under the Government’s auto-enrolment scheme at the relevant time.
Holiday	25 days plus Bank Holidays per annum on dates agreed with the Headteacher. Where a Bank Holiday falls in term time and you are required to work, you will be granted another day off in lieu to be taken at a date to be agreed with the Headteacher.
Lunch	Provided free while catering facilities are functioning, normally during term time only.
Notice	3 months’ written notice either by the employee or employer.
Medical	All employees are subject to a self-declaration medical report and to undergo a medical examination, if required.
Probation Period	This post is subject to a 12-month probation period.
Safeguarding	Holme Grange School is committed to safeguarding and promoting the welfare of children and applicants must be willing to undergo child protection screening appropriate to the post including checks with past employers and the Disclosure and Barring Service.



Bursar - Person Specification

	Essential	Desirable
Right to work in the UK	*	
Knowledge/Qualifications		
Qualified Accountant (ACA, ACCA, CIMA, CIPFA) or significant experience	*	
Good sector knowledge, including financial management, HR, compliance, and estates and facilities management	*	
Knowledge of relevant financial regulations, including the Charity SORP, and financial reporting standards (FRS 102)	*	
Understanding of the legal and regulatory framework for independent schools including the ISI and Ofsted frameworks as well as HMRC, and Charity Commission requirements	*	
Good understanding of GDPR and data protection requirements	*	
Excellent user of Microsoft Office – including Office 365, Word, Excel, PowerPoint & Microsoft Teams	*	
Knowledge of KCSIE (Keeping Children Safe in Education)		*
Experience and Skills		
Senior leadership within an educational environment	*	
Proven track record of managing finance at scale, ideally in a multi-site organisation	*	
Significant experience producing management accounts, forecasting and budget setting	*	
Significant experience of leading and managing compliance, including complex regulatory frameworks and audits	*	
Experience of managing and mitigating risk	*	
Strong analytical and problem-solving skills, with a data-driven approach to decision-making	*	
Technical/IT literacy and aptitude	*	
Excellent written and verbal communication skills	*	
Excellent stakeholder management skills, with the ability to build strong relationships.	*	
High level of accuracy and attention to detail	*	
Professional attributes		
Adherence to the Nolan Principles of Public Life	*	
Alignment with values, aims and ambitions of the school	*	
Strong commercial acumen	*	
Approachable, collaborative and collegial	*	
The ability to interpret legislation and explain requirements in simple, practical terms	*	
Ethical leadership and setting standards for others	*	
Ability to exercise good judgment and make evidence-based decisions	*	
Promotes Equality, Diversity and Inclusion	*	
Demonstrates personal and professional integrity	*	
Proactive, solution-focused, and able to take initiative	*	
Organised and able to meet deadlines	*	
A strong commitment to effective safeguarding practice	*	
Willingness to learn, develop, and receive feedback	*	
Ability to travel occasionally	*	