

## Role Profile

### School Business Manager

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| <b>Role Summary:</b>   | The School Business Manager is the school's leading support staff professional and works as part of the Senior Leadership Team (SLT) to assist the Headteacher and work with the SLT in the strategic leadership of the school. The School Business Manager is responsible for providing leadership and management of the business and operational aspects of the school. They promote the highest standards of service through the administrative functions of the school and ensures the most effective use of resources, managing the support staff to ensure the school achieves its objectives and operates compliantly, efficiently and safely. |
| <b>Site:</b>           | Undershaw and Arts and Media Centre sites   |
| <b>Annual Salary:</b>  | Competitive – in line with skills and experience  |
| <b>Hours:</b>          | Full time – 52 week contract<br>Holidays to be agreed with the Headteacher  |
| <b>Terms:</b>          | Permanent contract with 6 month probationary review   |
| <b>Line Managing:</b>  | Finance<br>GDPR<br>IT and Network Management<br>Admin<br>HR and Compliance (including the SCR)<br>Marketing and Fundraising<br>Site and Premises<br>Lettings<br>Health and Safety<br>Contractors<br>Service Level Agreement Providers   |
| <b>Support:</b>        | Assistant School Business Manager   |
| <b>Responsible to:</b> | Headteacher   |

#### Main Purpose

The School Business Manager (SBM) is responsible for managing the strategy and operation of the business functions of our school, including financial management, health and safety, human resources, marketing, GDPR, compliance and administration.

They will advise on and implement the day-to-day support that enables the school to operate effectively and efficiently, and that allows other members of the leadership team to focus on teaching and learning.

#### Duties and Responsibilities

#### Safeguarding

- Set the highest standard of example in terms of safeguarding and professional behaviours in line with the most up to date guidance, including Keeping Children Safe In Education and Working Together To Safeguard Children and supporting with embedding these within the culture of the school.

## Leadership

- Be responsible for line-managing support staff, including carrying out long-term resource planning and overseeing the management of recruitment, appraisal and professional development.
- Under the direction of the headteacher, lead on all financial matters in school, to ensure the school's successful financial performance and to ensure financial decisions are clearly linked to the school's strategic goals.
- Lead the strategic development of the school in the allocated areas of responsibility, embedding, maintaining and monitoring to ensure the highest standards.
- Implement school-wide changes and allocate resources in line with the school improvement plan, putting policies and procedures in place and communicating them to staff.
- Take all decisions in line with the vision and values of the school, and encourage others to do the same.
- Oversee the management of the marketing plan for the school, which utilises the school website, signage, the prospectus, and communications with current and prospective parents.
- Together with the IT Consultant, monitor developments in technology and consider how it can be used to enhance the school's business processes, teaching and learning, and staff wellbeing.
- As a member of the senior leadership team, attend all leadership team meetings and report to Finance and Staffing Committee and Full Governing Body meetings where appropriate.
- Be responsible for reporting to stakeholders such as Trustees, SLT, Local Authorities and parents. Be responsible for keeping up to date on all the latest legislation and training, updating staff accordingly.
- Be responsible for updating school policies and ensuring that they reflect the latest legislation and guidance.
- To share a part of the school holiday on-call duty contact rota, details of which will be discussed with you.

## Financial management

- In partnership with the headteacher, manage the school's budget and ensure it is balanced, realistic, and represents an effective use of public funds.
- Submit the budget to the governing board.
- Monitor the budget all year round, advising the headteacher where revisions or changes are needed.
- Propose revisions to the budget if necessary, in response to significant or unforeseen developments.
- Forecast future years' budgets, based on the school's estimated funding and trends in expenditure, to enable the headteacher to make strategic, long-term decisions.
- Comply with financial reporting requirements and submit statutory returns.
- Work collaboratively with the School's Auditors in the preparation and filing of accounts to relevant audit standards.
- Ensure compliance with the Companies Act and Charities Act according to current recommended practice.
- Oversee the management of school bank accounts on a day-to-day basis, ensuring money is banked, invoices are paid promptly, money owed is collected, and clear records are kept.
- Together with the Assistant School Business Manager, liaise with HMRC, Pension Authorities and other external agencies on financial matters and ensure compliance with statutory financial requirements.
- Take appropriate action to account for and safeguard the School's assets.
- Advise the Headteacher and Governors if fraudulent activities are suspected or uncovered.

- Together with the Head Teacher and Marketing Manager, develop and implement the school's fundraising and income generation strategy, choosing fundraising priorities in line with the school improvement plan.
- Lead on procurement processes, managing tenders where appropriate, conducting due diligence, benchmarking and evaluating suppliers, negotiating deals and ensuring value for money.
- Manage the school's lettings offer.
- Ensure the effective and efficient operation of the finance department, delegating tasks to finance/office staff where appropriate.
- Ensure that Service Level Agreements and Joint Controller Agreements are issued to external providers on an annual basis.
- Review and implement appropriate policies and procedures to ensure robust financial practices and accurate, timely financial reports to the Head Teacher and Governors.
- Keep abreast of external financial matters and explore opportunities to benchmark the Company's income streams, costs, financial performance and pay scales against similar organisations.

#### Human resources

- Together with the Assistant School Business Manager, manage the school's payroll provision with the payroll provider, including the management of pension schemes and payments to HMRC.
- Create accurate staffing cost forecasts and ensure that monthly payroll reconciliations are undertaken.
- Review the school's Pay Policy on an annual basis taking account of national pay award information to ensure that the school's pay remains competitive.
- Ensure that recruitment, appraisal, disciplinary and grievance policies are administered in accordance with employment law.
- Manage the Human Resources Manager ensuring that HR issues within school are dealt with appropriately and where necessary liaise with the school's external HR consultant.
- Conduct reviews of the school's staffing structure to ensure effective deployment of staff and financial efficiency.
- Oversee the management of the Single Central Record.
- Ensure the school's equality policy is clearly communicated to all staff in school.
- Manage recruitment, performance management, appraisal and development for key staff.
- Together with the SLT, ensure staff have a clear understanding of the policies and procedures and the importance of putting them into practice.
- Put in place and make use of specialist expertise in relation to legal and HR issues.
- Evaluate the school's strategic objectives and obtain information for workforce planning.

#### Health and safety

- Act as the school's Health and Safety Co-ordinator.
- With the Headteacher, Assistant School Business Manager and Premises Team, supervise the maintenance of the school site.
- Manage the school's compliance with health and safety regulations and put in place processes and procedures to ensure the safety of all in the school.
- Organise health and safety training for staff.
- Ensure that Health and Safety records including internal and external statutory and regular testing are maintained.
- Ensure that termly fire drills are undertaken and that records of fire practices and alarm tests are maintained.

- Ensure the school's written health and safety policy statement is clearly communicated and available to all people.
- Ensure the health and safety policy is implemented at all times, put into practice and is subject to review and assessment at regular intervals or as situations change.
- Enable regular consultation with staff on health and safety issues.
- Ensure systems are in place to enable the identification of hazards and risk assessments and that risk assessments are up to date, reviewed and in place as required.
- Ensure systems are in place for effective monitoring, measuring and reporting of health and safety issues to the Senior Leadership Team, Governors and where appropriate the Health and Safety Executive.
- Ensure the maximum level of security consistent with the ethos of the school.

### Facility and Property Management

- Follow sound practices in estate management and grounds maintenance.
- Ensure a safe environment for the stakeholders of the school to provide a secure environment in which due learning processes can be provided.
- Ensure the safe maintenance and security operation of all school premises.
- Maintain a Premises development plan taking account of the school's conditions survey, planned and reactive maintenance, health and safety issues and the rolling programme of scheduled works.
- Ensure that an appropriate number of quotations are sought for premises works allowing enough time to schedule works during closure periods (where possible).
- Ensure that contractors are assessed on their suitability to undertake works and that they provide appropriate insurance certificates, method statements and risk assessments.
- Monitor, assess and review contractual obligations for outsourced school services.
- Ensure ancillary services e.g. cleaning are monitored and managed effectively.
- Manage the maintenance of the school site including the purchase and repair of all furniture and fittings.
- Manage the letting of school premises to external organisations, for the development of the extended services and local community requirements.
- Seek professional advice on insurance and advise the SLT on appropriate insurances for the school and implement and manage such schemes accordingly.

### Compliance

- Manage the school's compliance with statutory obligations, and advise others on the relevant legal, regulatory and ethical requirements.
- Together with the SLT, track all school policies and ensure they are updated in accordance with the policy review schedule.
- Monitor and update the risk register. Identify, record and monitor corporate risks and instigate appropriate mitigation as directed by the Governors and Senior Leadership Team.
- Monitor compliance with the GDPR and other data protection laws ensuring that policies, privacy notices and data retention schedules are regularly reviewed.
- Ensure that staff receive training relating to GDPR.
- Be the contact point for Subject Access Requests.
- Be the contact point with the ICO.
- Maintain a rota for Data Protection coverage during school holidays.
- Keep the Headteacher and Governors informed of GDPR issues as required.

- Keep the breach register up to date and ensure breaches are responded to in a timely manner and followed up in line with guidance.
- Ensure Data Retention arrangements are in place and processes are in place for data management.

### Administration

- Keep records in accordance with the school's record retention schedule and data protection law, ensuring information security and confidentiality at all times.
- Be the school's Data Officer, taking responsibility for monitoring data protection compliance and advising the school community on data protection issues (with the support of an external Data Protection Officer).
- Manage systems and link processes that interact across the school to form complete systems.
- Establish and use effective methods to review and improve administrative systems.
- Prepare information for publications and returns for the DfE, LEA and other agencies and stakeholders within statutory guidelines.
- Create and submit the School Level Annual School Census to the DfE.

### Management Information Systems and IT

- Working with the school's IT support company, ensure that the school has a strategy for using technology aligned to the overall vision and plans for the school ensuring value for money.
- Consider approaches for existing use and future plans to introduce or discard technology in the school.
- Consult with relevant people and other parties to introduce new technology or improve existing technology for different purposes.
- Ensure resources, support and training are provided to enable work colleagues to make the best use of available ICT including teaching, learning and assessment systems.
- Establish systems to monitor and report on the performance of technology within the school.
- Ensure contingency plans are in place in the case of technology failure.
- Ensure filters and firewall systems are in place, operating and monitor for effectiveness, updating as required.

### Corporate Matters

- Liaise with the School's insurers, ensure policy compliance and appropriate levels of cover as directed.
- Maintain the Statutory Books and ensure appropriate notifications in compliance with the Companies Act and Charities Act.
- Draft and recommend policies and procedures relating to Health and Safety, Facilities and Financial matters to ensure compliance with legislation and current best practice.

### General Commitment to the Role

- Willingness to conform to the School's aim and policies.
- Flexibility in the approach to deal with emergency situations.
- Awareness and understanding of Safeguarding and Child Protection issues.
- Awareness of Health and Safety and Equality of Opportunity in the workplace.
- Actively support in the Safeguarding and Wellbeing of all stakeholders.
- Ensure compliance with General Data Protection Regulation (GDPR).
- Ensure compliance with legal requirements and that legal advice is sought as required.
- Ensure compliance timetable is up to date and adhered to and shared with SLT.

- Ensure and display commitment to the implementation of the school vision and ethos.
- Always remain committed to the school's policies and ensure these are followed.
- Support and participate in raising of levels of achievement for all our students.

### Communication and Collaborative Working

- Collaborate as a member of the Senior Leadership Team across sites and across all teams ensuring that all areas of leadership are integrated and complement each other.
- Manage policies around the areas of responsibility and ensure they are kept updated.
- Update policies related to Business and Operations and ensure they are reviewed and communicated as required, including updates and reminders to ensure policies are lived as well as read.
- Maintain confidentiality in line with the school's policies.
- Manage the communication of information relating to Business and Operational matters and ensuring that staff are kept updated and appraised as appropriate.
- Chair regular team meetings and line management meetings, keeping records of all communications.
- Ensure accurate record keeping, documentation drafting, information gathering and contributing to reviews, investigations and report writing as required.
- Promote an integrated way of working ensuring that all teams and support networks collaborate and take a multi-disciplinary approach to working together and supporting all students.
- Contribute to the Admissions and Transition processes and specifically to Funding and Contract arrangements.

Undershaw is committed to safeguarding and promoting the welfare of children and young people in accordance with DFE Safeguarding Children and Safer Recruitment regulations. The school expects all staff and volunteers to share this commitment.

This job description will be reviewed annually and may be subject to amendment or modification at any time after consultation in the light of changing school needs. It is not a comprehensive statement of procedures and tasks but sets out the main expectations of the School in relation to the post holder's responsibilities and duties.

**Note:** this job description is not your contract of employment, or any part of it. It has been prepared only for the purpose of school organisation and may change either as your contract changes or as the organisation of the school is changed. Nothing will be changed without consultation. This document must not be altered once it has been signed but will be reviewed annually.

**Signature of Post Holder:**

**Date:**

**Signature of Headteacher:**

**Date:**

Person specification

| CRITERIA  | ESSENTIAL   | DESIREABLE  |
|---|---|---|
| <p><b>Education and Experience</b></p>                    | <ul style="list-style-type: none"> <li>➤ Experience of working in an educational establishment</li> <li>➤ GCSE English and Maths at Grade C or above</li> <li>➤ Proficient in Microsoft Office products, particularly Word and Excel</li> </ul>   | <ul style="list-style-type: none"> <li>➤ Experience of working in a SEN school</li> <li>➤ A degree or other relevant qualification - ideally in accountancy, business management or a related discipline</li> <li>➤ A school business management qualification e.g. DSBM/CSBM</li> </ul>  |
| <p><b>Knowledge, abilities, skills and experience</b></p> | <ul style="list-style-type: none"> <li>➤ Line management experience</li> <li>➤ Expert knowledge of financial management</li> <li>➤ Expert knowledge of health and safety requirements in a school setting</li> <li>➤ A good understanding of Safeguarding in a school setting</li> <li>➤ Excellent attention to detail</li> <li>➤ High professional standards, judgment, discretion and ability to maintain confidentiality.</li> <li>➤ Experience of drafting and producing accurate financial information and reports</li> <li>➤ Ability to meet deadlines.</li> <li>➤ Previous use of accounting software e.g. Xero</li> <li>➤ Effective communication and interpersonal skills</li> <li>➤ Ability to build effective working relationships with staff and other stakeholders</li> <li>➤ Understanding of data protection and confidentiality</li> </ul> | <ul style="list-style-type: none"> <li>➤ Successful leadership and management experience in a school, or in a relevant field outside education</li> <li>➤ Involvement in school self-evaluation and improvement planning</li> <li>➤ Previous use of budgeting software and SIMS</li> <li>➤ Ability to communicate a vision and inspire others</li> <li>➤ Contributing to staff development</li> </ul> |

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| <p><b>Personal Characteristics</b></p> | <ul style="list-style-type: none"> <li>➤ Ability to work unsupervised</li> <li>➤ A team player willing to step in and help your colleagues</li> <li>➤ Flexible approach to the task in hand</li> <li>➤ Willing to undertake training as required</li> <li>➤ Commitment to promoting the ethos and values of the school and getting the best outcomes for all pupils</li> <li>➤ Commitment to acting with integrity, honesty, loyalty and fairness to safeguard the assets, financial probity and reputation of the school</li> <li>➤ Ability to work under pressure and prioritise effectively</li> <li>➤ Commitment to maintaining confidentiality at all times</li> <li>➤ Commitment to safeguarding and equality</li> <li>➤ Embraces change well</li> <li>➤ Deals with difficult situations effectively</li> </ul> |   |
| <p><b>Other requirements</b></p>       | <ul style="list-style-type: none"> <li>➤ Suitability to work with children (A full DBS will be applied for)</li> <li>➤ Patient and resilient</li> <li>➤ Good sense of humour</li> <li>➤ Understanding of the School's ethos and values</li> </ul>   | <ul style="list-style-type: none"> <li>➤ Driving license and own transport</li> </ul> |