

BURSAR AND CLERK TO THE GOVERNORS

Job Description and Person Specification

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| Job description | |
| The School is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. | |
| Summary of the role: | <p>The Bursar is a key player in the happy and successful life of the School. The Bursar is the Clerk to the Governors and is responsible to the Head for the conduct of the financial affairs, business management and the material state of the premises and to the Chair of Governors as Clerk to the Governors. The Bursar assists the Head and colleagues on the Senior Leadership Team to formulate the School's Strategy; the Bursar's advice on financial planning, and efficiency in its implementation, are crucial to the success of the School.</p> <p>The Bursar leads and manages all maintenance, finance and domestic staff and has functional responsibility for the School's administration. The Bursar is a member of the Senior Leadership Team, attending weekly meetings and, with the Head, meets regularly with the Chair of Governors and the Chair of the Finance & General Purposes Committee.</p> |
| Line Manager: | <ul style="list-style-type: none"> ▪ Head |
| Line management responsibility for: | <ul style="list-style-type: none"> ▪ Head of Support Services ▪ School Accountant ▪ Purchases Officer ▪ HR Function (currently outsourced to VERO HR, with an onsite HR Advisor) |
| Functional Relationships with: | <ul style="list-style-type: none"> ▪ Governors ▪ Head ▪ Senior Leadership Team (SLT) |
| Main duties and responsibilities: | <ul style="list-style-type: none"> ▪ Promoting and safeguarding the welfare of children and young persons for who you are responsible and with whom you come into contact. ▪ Finance and Accountancy ▪ Compliance, including acting as the designated Data Controller for the School ▪ General Management and Administration |

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| | <ul style="list-style-type: none"> ▪ School Assets and Resources ▪ School Buildings and Estates ▪ Clerk to the Governors |
| 1. Finance and Accountancy | <ol style="list-style-type: none"> 1.1. Maintain and advise on the School's general financial policy. 1.2. Working with the Head, prepare a five-year budget for the School, to include a detailed annual estimate of income and expenditure, to include the preparation and promulgation of the School's departmental budgets, in consultation with Head and SLT. 1.3. Monitor income and expenditure in relation to the budget and presenting termly management reports to the Governing Body. 1.4. Keep the accounts of the School and preparing Statements of Financial Activity (SOFA) and balance sheets in accordance with the charities Statement of Recommended Practice (SORP) and the requirements of the Woodard Corporation, working with the School's Auditors as necessary. 1.5. Maintain cash flow projections for the current and future years. 1.6. Advise on investments in consultation with the School's investment managers. 1.7. Oversee the preparation of pupil invoices and collection of all fees and extras, ensuring that outstanding fees are collected in accordance with the School's policy and, if necessary, passed to third parties for legal recovery action. 1.8. Payment of all salaries, including PAYE, Pension and National Insurance Contributions and compliance with regulations for benefits in kind. 1.9. Oversee the administration and reconciliation of the School's bank accounts 1.10. Supervise the administration of the pension schemes for teaching and non-teaching staff. 1.11. Scrutinise and approve for payment all invoices received in the School. 1.12. Assist in organising special appeals for capital projects or endowment funds. 1.13. Advise on taxation matters generally and ensure compliance with regulations for VAT. 1.14. Advise on the financial implications of the charitable status of the School. 1.15. Operation of the School's advanced fees scheme. 1.16. Advise on scholarship and bursary funds and undertake assessments of parents' income and assets prior to recommending bursary awards to the Head. 1.17. Liaise with the Chair of the Parent-Teacher Guild (PTG) regarding the Parent Teacher Guild finances. 1.18. Liaise with the Woodard Corporation, particularly the Finance Officer, Senior Provost and Registrar as necessary. Ensure compliance with Woodard Instructions and attendance at relevant Woodard meetings. |
| 2. Compliance | <ol style="list-style-type: none"> 2.1. Act as the School's compliance officer. 2.2. Ensure compliance with all relevant aspects of The Education (Independent School Standards) |

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| | <p>Regulations 2014 and as subsequently updated, including all relevant advisory documents as published, making recommendations to the Head and Senior Leadership Team to ensure best practice is followed.</p> <p>2.3. Ensure compliance with all relevant aspects of employment law including employment protection, equal pay, parental rights, the National Living Wage, the Working Time Directive and the Equality Act 2010.</p> <p>2.4. Advise on the employment, terms and conditions of service, supervision and welfare of all staff. To include compliance with safer recruitment regulatory requirements.</p> <p>2.5. Ensure compliance with all relevant aspects of UK Visas and Immigration Sponsorship.</p> <p>2.6. Formulate, monitor and implement the School's policy and procedures to comply with the requirements of health and safety legislation, to include fire precautions, asbestos control and water safety. Act as the School's health and safety assistant within the school, chairing the Health and Safety Committee.</p> <p>2.7. Ensure that the School is compliant with the Regulatory Reform (Fire Safety) Order 2005, to include the proper installation and maintenance of equipment for the detection, warning, protection and escape from fire.</p> <p>2.8. Ensure compliance with the regulations for the operation of minibuses, driver training and assessments; servicing and vehicle inspectorate tests.</p> |
| <p>3. General Management and Administration</p> | <p>3.1. Manage the employment, terms and conditions of service, supervision and welfare of all non-teaching staff.</p> <p>3.2. Oversee the School's Human Resources function, providing line management support to the School's in-house HR advisor, as provided by the School's HR Consultants.</p> <p>3.3. Through the Head of Support Services, supervise the provision of catering, domestic and estate services.</p> <p>3.4. Carry out risk assessments where appropriate and monitor all departments to ensure that they are carrying out risk assessments.</p> <p>3.5. Liaise with the Woodard Corporation to ensure the School has adequate insurance cover at all times to include employer's and public liability, buildings and equipment cover, personal accident, travel insurance and other relevant cover.</p> <p>3.6. Ensure cost effective purchasing either directly or through consortia and the Woodard Corporation, of all goods and services for the School.</p> <p>3.7. Arrange staff accommodation, dealing with the letting of property to school employees and third parties; ensure that the appropriate leases and licenses to occupy are taken by tenants.</p> <p>3.8. Oversee the commercial letting and hire of school premises to outside organisations.</p> <p>3.9. Act as the link with relevant Government departments or Non-Government Organisations, with the responsibility for the processing of any applications, formulating any records and making any returns</p> |

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| | <p>required. This will include the Disclosure and Barring Service, the Financial Conduct Authority, the Information Commissioner, Companies House, the Charity Commission, OFSTED and the Immigration Service.</p> <p>3.10. Advise on and take the appropriate physical security measures within the School for protection of both staff and pupils.</p> |
| 4. School Assets and Resources | <p>4.1. Responsible for the School's Planned Maintenance Programme, including the annual works and maintenance plan, the implementation of which is reported to Governors on a termly basis.</p> <p>4.2. Undertake the necessary project work in accordance with the School Development Strategy.</p> <p>4.3. Ensure the maintenance and efficiency of the installations and plant for electric and gas supply, heating and domestic hot water. Promote energy and water conservation.</p> <p>4.4. Ensure the maintenance of the lighting and ventilation in all school buildings is effective and regulatory compliant.</p> <p>4.5. Undertake the Carbon Reduction Commitment process in conjunction with Woodard, to ensure compliance with the Department for Energy and Compliance Change requirement on record keeping and payment of levy.</p> <p>4.6. As necessary in liaison with architects draw up initial specifications, plans and costings for new or refurbished buildings or internal areas. This will subsequently include undertaking the tendering process, obtaining planning permission and project management with architects and builders.</p> |
| 5. School Buildings and Estate | <p>5.1. Ensure the necessary upkeep of the School's buildings and grounds.</p> <p>5.2. Oversee the management of the School's sports equipment and facilities.</p> <p>5.3. Undertake a progressive tree husbandry programme, to ensure compliance with the three yearly arboriculture inspection requirements.</p> <p>5.4. Ensure that all sewers and water courses are properly maintained, and effective land drainage is in place.</p> <p>5.5. Ensure the proper maintenance of school boundaries, roads and rights of way, liaising as necessary with adjoining property owners.</p> <p>5.6. Ensure there is safe and effective traffic management on the School site.</p> |
| 6. Clerk to the Governors | <p>6.1. Administer the Charity and Company on a day-to-day basis, working as the routine point of contact with the Charity Commission, Companies House and Woodard Corporation, ensuring that all statutory and other actions are completed and filed on time.</p> <p>6.2. Provide advice to the Chair of Governors on charitable and company law, recommended practice and procedural issues.</p> |

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| | <ul style="list-style-type: none">6.3. Act as Secretary for all meetings of the Governing Body and relevant committees. Prior to such meetings, liaise with the Chair and Head to agree the agenda and procedure for the meeting.6.4. Draw up the minutes for the School Council, Finance & General Purposes Committee, Safeguarding Committee and Health and Safety Committee meetings and other meetings as requested.6.5. Comply with Woodard procedures for the appointment and resignation of Governors.6.6. Administer the process for identifying, interviewing, appointing and inducting governors, liaising with the Woodard Corporation as necessary.6.7. Maintain a register for all governors aimed at recording their School and Woodard appointment details, experience, duties carried out and training undertaken.6.8. Undertake the annual Review of Interests with Governors.6.9. Undertake the annual audit of governance with the Governing Body.6.10. Provide an administrative and advice service as required for the Governing Body.6.11. Establish and service Governors' Appeal Panels for hearings associated with disciplinary matters, grievances and parental complaints. |
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You may also be required to undertake such other comparable duties as the Chair of Governors or Head requires from time to time.

| Person Specification The School is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. | | | |
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| | Essential | Desirable | Method of assessment |
| | These are qualities without which the Applicant could not be appointed | These are extra qualities which can be used to choose between applicants who meet all of the essential criteria | |
| Qualifications | <i>The professional, technical or academic qualifications that the Applicant must have to undertake the role or the training that they must have received</i> | <i>The professional, technical or academic qualifications that the Applicant would ideally have to undertake the role or the training that they should ideally have received</i> <ul style="list-style-type: none"> ▪ Good Honours Degree ▪ Chartered Accountant ▪ Chartered Secretary ▪ IOSH Managing Safety qualified | Production of the Applicant's certificates Discussion at interview Independent verification of qualifications |
| Experience | <i>The categories of work or organisations, types of achievements and activities that would be likely to predict success in the role</i> <ul style="list-style-type: none"> ▪ A proven track record of achieving excellent results ▪ Evidence of successful senior management ▪ Evidence of successful leadership in a complex organisation ▪ Involvement in financial planning and budgeting | <i>The categories of work or organisations, types of achievements and activities that would be likely to contribute to success in the role</i> <ul style="list-style-type: none"> ▪ Experience of being involved in Estates management ▪ Experience of being involved in catering and facility management ▪ Experience of co-ordinating and managing building projects ▪ Experience of training staff | Contents of the application form Interview Professional references |

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| <p>Skills</p> | <p><i>The skills required by the Applicant to perform effectively in the role</i></p> <ul style="list-style-type: none"> ▪ Ability to chair and be secretary to meetings ▪ Excellent communication skills ▪ Excellent IT skills, including knowledge of accounting and administration systems ▪ Able to prioritise short, medium and long-term plans to ensure objectives are achieved ▪ First-class planning, analysis and organisational skills | <p><i>The skills that would enable the Applicant to perform effectively in the role</i></p> | <p>Contents of the application form</p> <p>Interview</p> <p>Professional references</p> |
| <p>Knowledge</p> | <p><i>The knowledge required by the Applicant to perform effectively in the role</i></p> <ul style="list-style-type: none"> ▪ Working knowledge of payroll matters | <p><i>The knowledge that would enable the Applicant to perform effectively in the role</i></p> <ul style="list-style-type: none"> ▪ Working knowledge of contract law, leasing, employment and charity law, purchasing, insurance matters ▪ Knowledge of the Schools' sector | <p>Contents of the application form</p> <p>Interview</p> <p>Professional references</p> |

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| <p>Personal competencies and qualities</p> | <p><i>The personal qualities that the Applicant requires to perform effectively in the role and to ensure that the Applicant safeguards and promotes the welfare of children and young people</i></p> <ul style="list-style-type: none"> ▪ Motivation to work with children and young people ▪ Ability to form and maintain appropriate relationships and personal boundaries with children and young people ▪ A strategic thinker, intellectually strong, able to initiate and develop fully key concepts and ideas ▪ Excellent inter-personal skills ▪ Ability to manage time demands and ensure deadlines are met ▪ Sympathetic to the Christian character of a Woodard School ▪ A willingness to contribute to the School's ethos ▪ Can show enthusiasm, tenacity and resilience with the ability to work under pressure, while maintaining a sense of humour | <p><i>The personal qualities that would assist the Applicant to perform effectively in the role</i></p> | <p>Contents of the application form</p> <p>Interview</p> <p>Professional references</p> |
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