

**HILLSIDE PRIMARY SCHOOL**

**JOB DESCRIPTION**

**TITLE: School Business Manager  
SALARY: Grade H, point 25-29 (£28,672 - £32,234)  
HOURS: 37 hours per week, 52 weeks per year  
RESPONSIBLE TO: Headteacher  
EFFECTIVE FROM: January 2022**

**PURPOSE OF THE ROLE**

To provide a flexible Business Management function for Hillside Primary school as part of the Active Learning Trust group of Academies.

The role combines the leadership of a business management support team of staff in the delivery of key support services and activities, whilst acting as professional lead in the school for the support of the Headteacher in:

* Strategic Finance and Budget Planning
* Financial Management and Monitoring
* Project Management including aspects of building and capital projects for school improvement
* Site, IT and Contract Management

**RESPONSIBLE FOR**

Line and performance management of a business support team of Finance and Administrative staff as appropriate, as well as the Site Manager and IT Operations to deliver out-of-class support services for the school.

**LEVEL OF THE ROLE DESCRIPTION**

The Business Manager will be a member of the Senior Leadership Team (SLT) of the school and will work directly with the Headteacher maintaining sensitivity and confidentiality on a range of working tasks, planning, and reporting on all aspects of the schools performance. This will involve the ability to determine when to refer matters to the Headteacher and for the need to seek authorisation/sign-off of documentation from the Headteacher or more widely across the Trust per the scheme of delegation.

All duties will be carried out within recognised procedures and guidelines. The post-holder will be expected to obtain a thorough knowledge and understanding of the range of organisational policies and procedures both for the school and the Trust and to contribute constructively to suggestions for system improvements.

The post holder will:

* Respond independently to unanticipated problems and situations
* Deal with complicated or sensitive information orally or in writing with a range of audiences
* Self-organise workload and have direct responsibility for the line and performance management of other employees
* Contribute positively and pro-actively as part of the Business Managers group of Active Learning Trust schools.

The post-holder will undertake a range of tasks which require theoretical practical and procedural knowledge across technical and specialist areas of operation including the requirement for policy knowledge at a school and Trust level.

**KEY DUTIES & ACCOUNTABILITIES**

**Leadership and Strategy**

Attend Senior Leadership Team and Governing Body meetings as appropriate.

Liaise with and inform Senior Leaders and Governors on business related matters to ensure compliance with policy and legislation.

Assist with the development and review of local policies and procedures, helping ensure that local procedures reflect ALT policies and comply with legislation.

Plan and manage change in accordance with the school development plan and other initiatives.

In liaison with Senior Leaders, seek opportunities to raise the profile and image of the school to a variety of audiences, e.g. Website, Parentmail, Social Media etc. Ensure a standard professional image. Promote events and extra-curricular activities to maximise outcomes.

**Staff Management**

Undertake the day to day line and performance management of the business support team in relation to Finance and Admissions, Site and IT staff including the setting of targets and objectives for the conduct and quality of work undertaken by the team, monitoring of work performance, undertaking staff appraisals and the analysis of staff training needs.

Contribute to the induction of new members of the whole staff body and lead the development and coaching of those who fall within line management responsibilities.

**Financial Management**

Line manage the Finance Assistant and act as authorising officer for all transactions, in line with delegations specified in the Financial Controls Manual.

Ensure that appropriate and required financial processes, procedures, systems and controls are in place for the prudent conduct of all school financial affairs, in accordance with the Financial Controls Manual. Reconciliation of financial records with statements and reports, investigating anomalies and pursuing any discrepancies within control accounts and both sales and purchase ledgers. Monthly reconciliation of corporate credit card expenditure.

Undertake budget setting, monitoring/forecasting and reporting using Trust approved financial IT and IMP reporting systems.

Monitor income, expenditure, cash-flows and deposits in line with Active Learning Trust procedures. Undertaking weekly bank reconciliations ensuring all items correctly input into PS Financials. Reconcile online Parentmail income on regular basis and manage arrangements for G4S secure cash collection for receipting payments into bank. Lead on all aspects of pupil finance such as educational visits and school meals. Responsibility for all school debt management following Trust guidelines.

Maximise income generation, from grants, fundraising, sponsorship, community lettings, extended schools or other initiatives (e.g. breakfast club provision).

Conduct appropriate staff expense reimbursement arrangements as required by the school.

Ensure accurate maintenance of the school’s contract register, inventories and fixed asset register. Liaise with IT and Site teams to ensure correct disposal of assets and relevant invoices raised for sales.

Procure and manage contracts with suppliers locally and contribute to the tender processes led by ALT central staff. Monitor the effectiveness and implementation of contracts. Ensure all appropriate licences and insurances are in place, including those for contractors.

Provide appropriate reporting and guidance to staff with budget management responsibilities.

Collate information required for internal and external audit, ensuring all deadlines are met.

Compile statutory monthly and year end management accounting reports adhering to internal Trust deadlines. Be the point of contact within the Trust for financial matters for and on behalf of Hillside Primary school. Work collegiately with the ALT finance managers to put in place and operate the full range of financial arrangements required of one of the Trust’s Academies.

**Administration Management / Data Protection**

Line manage the Administration Officer – Admissions. Ensuring funding for EYFS is undertaken and Census reporting submitted within DfE timescales.

In liaison with the Headteacher’s PA / HR Officer, contribute to the provision of a high quality and customer-orientated reception function for the school, supporting a culture of customer care relating to relationships of the office teams with pupils, parents, carers and other visitors to the school.Maintain a consistent and high expectation for all school communication relating to letters, parents’ evenings, website, Parentmail etc.

Support the work of finance and administrative staff in the correct and accurate use of school business and admin systems including Parentmail (Iris), SIMS, EPM Portal, PS Financials, IMP, Vericool, Evolve, Wonde, Inventry, Handsam and other in-house systems. Responsibility for maintaining GIAS data for Hillside Primary on DfE system.

Ensure that all general administrative functions of the school office (including free school meals, school census and admissions / leavers arrangements, data management) are in place and operating effectively. Ensure Vericool and SIMS reconcile for both UFSM and FSM entitlements. Oversee annual review of data collection sheets and pecuniary interest forms.

In liaison with the Headteacher, be the main point of contact with the Trust’s Compliance & Data Protection Manager (DPO). Maintain the GDPR Handbook, disseminate information and updates and offer guidance and support to senior leaders and the whole staff as appropriate. Coordinate the processing of Subject Access Requests, in conjunction with the DPO), and report any identified data breaches to the DPO.

Ensure that all office and site management staff work together to enhance the promotion, recording and timely collection of community lettings income in addition to agreeing and maintaining the security arrangements of the school premises.

**HR Management**

Contribute to the strategic planning of the staff structure and advise on budget implications. As required create, or advise others when creating, job descriptions for new roles. Review and update job descriptions as appropriate.

Support the Headteacher’s PA / HR Officer in the administration of staff and volunteer appointments, HR records and payroll functions including maternity, absence, overtime etc. checking for compliance to policies and legislation and updating the budget plan as appropriate.

Act as the authorising officer on the EPM Portal for payroll matters and ensure that these are up to date and accurate. Undertake monthly payroll reconciliations in EPM, PSF and IMP.

Act as alternate for staff recruitment & records administration and Single Central Record matters in the absence of the Headteacher’s PA / HR Officer.

**Management Information Systems and ICT**

In liaison with the Headteacher and the Trust’s Finance & Operations Director and central IT staff manage the IT operations, to ensure reliable and effective IT services in support of teaching and learning and the administrative functions.

Ensure the overall budget plan includes appropriate provision for refresh / enhancement of the IT infrastructure in support of the Trust aims and school development plan.

Ensure any changes to the school’s IT infrastructure are planned, procured and implemented effectively.

**Site and Facilities Management**

Line manage the Site Manager, directing the work of him/her and their team in liaison with the Headteacher and working closely with him/her to ensure that Health & Safety procedures are followed and risks are identified/managed effectively.

Ensure that the site team are correctly and effectively making use of IT tracking systems to manage site maintenance, security and health and safety issues (e.g. Safesmart Smartlog, Bellrock Concerto and Handsam) as required by the Active Learning Trust and for legal compliance.

Ensure that all site management, maintenance, project and other activities are within budget, delivered to satisfactory work standards and compliant with H&S and safeguarding policy.

Maintain a Premises Development Plan in liaison with the Site Manager and Headteacher, addressing Health & Safety and security needs and to develop teaching environments to support learning.

Ensure that appropriate project management/contractor liaison is in place for the delivery of premises developments taking place at the school.

Ensure that the site team provide appropriate information and updates to staff across the school on the arrangements for and progress concerning premises improvements and health and safety issues.

Ensure that appropriate day to day management arrangements are in place for the provision of Cleaning, Catering, Grounds Maintenance and other ancillary services for the site, whether delivered in-house or contracted out. For contracted out services, actively monitor and report any concerns to the Trust as appropriate.   
  
Oversee and manage community lettings with the site team ensuring premise security is stringently maintained and income received on a timely basis.

**Headteacher / Trust Support**

Assist the Headteacher as required as part of medium and long term planning of projects and school improvement and / or implementation of new Trust initiatives.

Represent the Headteacher as determined in particular meetings / functions where the knowledge of the Business Manager makes their attendance key and appropriate.

Produce reports and analysis for the schools Local Governing Body and / or the Active Learning Trust as required (e.g. monthly finance returns, budget monitoring reports etc).

Attend meetings of the Trust (e.g. Finance Leads) or the Local Governing Body as required.

Attend appropriate training sessions/briefings for the purpose of professional knowledge / systems update at both school and Trust level.

Any other duties which may reasonably be considered within the remit of the post.

This job description is not necessarily a comprehensive definition of the post. It is open to periodic review by appropriate consultation. The duties and responsibilities may vary from time to time according to the changing needs of the school.

Other tasks may therefore be added by negotiation. These include tasks which the Headteacher may reasonably require from time to time and/or others about which the post holder is enthusiastic and is in keeping with the aims and objectives of the school.

The Headteacher and Governors are all committed to safeguarding and promoting the welfare of children, young people and vulnerable adults, and expect all staff and volunteers to share this commitment. We ensure safer recruitment procedures are effectively in place, and DBS checks or police vetting will be required for all posts.

Issued: November 2021

**HILLSIDE PRIMARY SCHOOL**

**PERSON SPECIFICATION**

**SCHOOL BUSINESS MANAGER**

**QUALIFICATIONS**

**Essential**

Education to NVQ Level 3 or comparable

**Desirable**

Educated to NVQ4 or above in a business, finance or administration vocational qualification.

**SKILLS/KNOWLEDGE**

**Essential**

A skilled multi-tasking individual who can hold a number of tasks in operation at the same time and can securely switch between them as the need/contingencies of the day require.

The ability to apply alertness and concentration e.g. in the production of financial reports and forecasts. The ability to work in an environment where there are likely to be interruptions (e.g. from other staff and pupils).

Excellent communications skills both orally and in writing – and including numeracy skills for the production of reports with financial information and focus.

Attention to detail and accuracy and a personal pride in the delivery of a first-class service.

Knowledge of financial planning and budget setting principles and practices.

Presenting information (often of a complex nature) in a succinct manner which will assist the understanding of audiences who may not be specialists in the area (e.g. producing information for school governors).

Skilled in the ability to demonstrate initiative and independence in the setting of own work priorities and scheduling – and that for the staff being managed.

Strong negotiating and influencing skills as required by the manager of a team of staff.

Ability to apply tact and diplomacy to diffuse conflict.

Ability to advise teaching and support staff and governors of the value of policies and procedures in clear and plain language which wins their support and co-operation.

Skilled user of manual records and IT systems for the recording of confidential information, personal and personnel records and budgetary information.

Microsoft skills to intermediate level or above (Excel, Word, PowerPoint, Publisher, Teams).

**Desirable**

Skilled in the application of financial planning and budget planning/monitoring and forecasting requirements ideally in a school/academy environment, including planning of financial information over months/ year e.g. annual expenditure/income/staffing budget.

Knowledge of the current national schemes and requirements in the financial reporting and budget setting requirements as they apply to Academies.

Knowledge of financial planning and budget setting principles and practices particularly as they relate to the operation of a large Primary school and within the Academies sector.

Knowledge and understanding of the role of school governors in relation to the areas affected by of school business management activities.

Direct application of knowledge gained concerning the setting and monitoring of staff performance targets and objectives.

**EXPERIENCE**

**Essential**

Using IT based systems for the financial and budgetary processing, planning and forecasting of a service delivery area.

Holding direct personal responsibility for the monitoring of budgets – particularly those relating to office based services (e.g. reprographics, stationery, utilities).

Significant experience of working in personal contact situations with clients/customers and the delivery of a responsive front-line service to them.

Direct and extensive experience of the operational systems put in place to ensure document and information confidentiality.

Experience of working in one or more roles involving multi-tasking and the management of strict deadlines for both internal and external audiences.

Managing at least one other person in the delivery of their role.

Previous use of general project management skills and research techniques in the production of reports or recommendations.

**Desirable**

Line and Performance management of a team of employees across discrete areas of responsibilities.

Experience of Customer care standards and team working in a front-line environment.

Awareness of Data Protection and Freedom of Information Act requirements as they relate to the education sector.

Awareness of health and safety processes and requirements as they relate to the management of a school premises.

Previous application of coaching and mentoring skills and the carrying out of induction training for new members of staff.

Knowledge of OFSTED and EFA requirements as they impact upon the preparation and reporting work required in schools.

Giving advice, guidance and recommendation to senior managers at Headteacher or Management Board level.

Experience of Working within a School Office team in a senior role.

Acting as part of a leadership team (ideally school leadership team) in influencing decisions and policies as they apply to school business management.