



Kelmscott School

"Putting Learning First"

JOB DESCRIPTION

Post:	School Business Leader
Hours:	36 per week, 52 weeks per year
Scale:	P09 49-52
Responsible for:	Assistant SBL, School Health Manager, Site & Facilities Manager, Network Manager, Communications & Systems Development Manager and Finance Officers
Responsible to:	Head Teacher

Job Purpose

The School Business Leader (SBL) holds a key post of responsibility within the school as the school's leading support staff professional. Reporting directly to the Head Teacher, the SBL is responsible for ensuring all non-teaching aspects of the school run efficiently and effectively.

The School Business Leader is responsible for providing professional strategic leadership and management of school support staff in partnership with teaching staff, to enhance their effectiveness in order to achieve improved standards of learning and achievement in the school. This will include:

- Providing high quality leadership and management of the school's business functions.
- Designing and implementing policies across different business functions in line with the school's strategic vision.
- Providing strategic and operational leadership in all aspects of finance and business management.
- Developing high quality reporting mechanisms across the different functions.
- Being responsible for the operation, maintenance and development of systems, processes and procedures relating to budgets, finances, HR, premises, community hire, income generation, school administration, GDPR, Marketing & Media.
- Provide strategic leadership of Information Technology
- Leadership in specific areas to ensure legal compliance and best practice in: Health and Safety, Human Resources, Out-sourced contracts, Safeguarding, Educational Visits, Financial Systems and Legal Compliance (including GDPR).
- The promotion of the schools aims, objectives and ethos
- Monitoring and evaluating performances and processes
- Establishing good working relationships with all stakeholders and external agencies

Duties and Responsibilities

Strategic Leadership and Management:

The School Business Manager will report directly to the Head Teacher and will ensure that an effective financial strategy is in place which maximises funding opportunities and continues a sustainable business model for the school.

- To give strategic vision and leadership to all aspects of budget, finance and operations across the school.
- To lead, operate, maintain and develop the financial, administrative, premises, catering, Information Technology and premises service and building programme in conjunction with the SLT and Governors, ensuring that legal and safety requirements with regards to people, property and function of the school are maintained
- To support the Governing Body and SLT in formulating aims and objectives of the school and in establishing the policies, systems and procedures through which they shall be achieved, including development of strategic and resource plans
- To promote the highest standards of business ethos ensuring best value principles.
- To support and encourage the school's ethos and its objectives, policies and procedures.
- To advise the Governors and SLT on matters relating to premises, finance, human resources, administration, operations and health and safety.
- To advise the SLT and all staff on all matters relating to their collective responsibility for prudent financial management of the school and other related activity. This includes maintaining appropriate financial systems and controls, ensuring the school complies with all regulatory requirements and that financial information is both accurate and readily available to support financial decision making processes.
- Providing leadership and guidance for all staff, including direct line management responsibility and appraisal for:
 - Assistant SBL
 - School Health Manager
 - Site & Facilities Manager
 - Network Manager
 - Communications & Systems Development Manager
 - Finance Officers
- To offer strategic contribution to the overall development of the school.
- To participate in meetings of SLT, Governing Body, appropriate governors' sub committees and the local authority.
- To advise on strategic decision making within the school's SLT as appropriate and negotiate accordingly.
- To understand the effects and implications of Government policies and guidance, company and charity legislation, for current and future initiatives

- In the absence of the head teacher, liaise with the associated head teacher to take delegated responsibility for financial decisions.
- Plan and manage change in accordance with the school development/strategic plan.
- Managing the disciplines of finance, human resources, ICT, premises management, whole-school administration including GDPR and marketing.
- Working closely and in effective partnership with the governing body, local authority and key colleagues regarding all the above disciplines.
- Managing marketing, publicity and communications, including the websites to enhance the school's reputation.
- Generating income to enable and further the school's aims.
- Producing timely and fully costed proposals for investment in new initiatives or capital assets, ensuring they are sustainable through long-term financial plans.
- Ensuring an effective link between the school's financial plan and the school's improvement plan – necessary for meeting the standards required by auditors and to achieve sustainable improvement.
- Understanding the implications of government policies and educational trends and developments and relay this appropriately to the head teacher and governing body. Plan for, and implement, new initiatives as appropriate for the school.
- Providing strategic support to the head teacher and governing body on all aspects of the school's business management.
- Ensuring the school makes the best possible use of resources through effective planning, considering all financial and other resource implications.
- Alongside other members of SLT, leading in the training and development of teaching and non-teaching staff.

Financial Management:

- Provide sound financial advice to Governing Bodies and the leadership team and an effective financial management service to the school.
- Act as the leading interface between management and Governing Bodies on financial matters
- Report on a timely basis, to the Local Authority in line with their specific requirements.
- To maintain a strategic financial plan that indicates requirements of school development overviews and forecast future budgets.
- The preparation of annual budgets and maintaining a regular overview of the financial monthly accounting. Evaluate information and consult with SLT, head teacher and governors to prepare a realistic and balanced annual budget for school activity.
- Working with the finance officer and other staff to implement the financial decisions of the head teacher and governing body.

- Prepare all financial returns for the DfE, LA and other central and local government agencies within statutory deadlines and standards especially SFVS. Ensuring that payroll, and other financial returns, are accurately submitted.
- To authorise orders and invoices as per the financial regulations.
- Management of all cost centres with a view to implementing best value.
- Ensure in close co-operation with the leadership team and Governing Bodies that an appropriate financial policy framework exists to guide schools' decision making.
- Create, present and submit quarterly Management Accounts to the head teacher and governors for approval. Ensure these reports use the agreed budget to actively monitor and control performance to achieve value for money. Identify and inform the head teacher and governors of the causes of significant variance and take prompt corrective action. Propose revisions to the budget if necessary, in response to significant or unforeseen developments.
- Identify and tender for all regeneration and external funding opportunities
- Undertake business and financial strategy, planning, monitoring, management and reporting including policies, systems, processes and risk assessment.
- Maintain records to meet legal and tax requirements and to measure both inputs and outcomes of the schools' operations.
- Assist auditors with statutory annual accounts
- Maintain contact with bankers, investment managers and pension advisers where applicable.
- Oversee the completion of the schools' payroll and ensure that these are processed through the financial management system.
- To supervise and monitor the computerised finance account package.
- Overall management of debt recovery reporting back to the Governing Body periodically.
- Liaise with appropriate bodies with respect to:
 - Insurance
 - Legal activities
 - Supplier/partner relationships
 - Regulatory body relationships
 - Approvals and accreditations
 - Purchasing, contracts and agreements
- Manage, negotiate and monitor all contracts, leases, service level agreements and relationships with external contractors.
- Submit capital bids to the DfE and Local Authority, monitor and control of capital expenditure on buildings and grounds, placing of contracts, appointment and monitoring of contractors.
- Promote the schools' activities and premises with the objective of maximising letting income, within agreed policies. Maximise income generation through activities within the ethos of the school.

- Manage the schools' bank accounts and closely monitor the School's cash flow and take corrective action in consultation with the head teacher when required.
- Develop and maintain a finance manual

In co-operation with the head teacher ensure;

- Governors are fully informed of schools' performance through access to management information systems
- Governors are briefed on financial and operational issues during committee and full Governing Body meetings.
- The school meets all targets and standards
- The school develops effective policies, practices and procedures
- The school remains in sound financial health
- Effective governance is achieved and maintained
- Advise the head teacher and governors if fraudulent activities are suspected or uncovered.
- Create, present and submit a 3 to 5year financial budget forecast to the head teacher and governors for approval. Monitor and maintain this strategic financial plan that will indicate the trends and requirements of the school development plan and will forecast future year budgets. Identify and inform the head teacher and governors of the causes of significant variance and take corrective action in a timely manner.
- Using financial management information, especially benchmarking tools, to identify areas of relative spend, assess trends and opportunities for improvement and directly advise the head teacher accordingly.
- Put formal finance agreements/contracts in place with suitable providers for agreed amounts, at agreed times and appropriate agreed costs and repayment schedules. Monitor the effectiveness and implementation of agreements.
- Advising the head teacher on investment and financial policy, preparing appraisals for the future projects and for the development of a long-term financial strategy for the future development of the school.
- Advising the governors on the policies needed to comply with all financial legislation and ensure they are in place.
- Maintaining and developing all targets identified through School Financial Value Standards

Human Resource Management:

- Provide support, advice and guidance to the Leadership team in the development of HR policies and plans, ensuring that the objectives and priorities are implemented and reviewed systematically as per the Governing Body policy cycle.
- Provide advice and guidance to the Leadership Team in developing new initiatives and managing change and maintain an oversight of the HR services provided to the school, including development of these services.
- Ensure that administrative, personnel, services and systems within the federation meet current legislation.
- Provide strategic and operational support in school restructure projects, partnerships and developments.
- To understand and accurately apply the school pay policy and teachers pay and conditions.
- To be an active participant in the performance management processes which will include an annual review.
- To regularly support the review of staff roles and responsibilities in the interest of the school's needs.
- Looking at the viability of staffing in line with income streams.
- Comply with statutory returns as requested locally and nationally inclusive of the submission of the School Census'.
- Liaise as and when appropriate with the Local Authority personnel, traded services, legal departments and other statutory and professional bodies.
- Payroll: to manage and complete the Payroll returns for the school on a monthly basis.
- Manage the payroll services for all school staff including the management of pension schemes and associated services.
- Ensure that all recruitment, appraisal, staff development, grievance, disciplinary and redundancy policies and procedures comply with legal and regulatory requirements.
- Manage recruitment, performance management, appraisal and development for all support staff.
- Monitor the relevant legal, regulatory, ethical and social requirements and the effect they have on your school and staff.
- Ensure staff have a clear understanding of the policies and procedures and the importance of putting them into practice.
- Monitor the way policies and procedures are actioned and provide support where necessary. Seek and make use of specialist expertise in relation to HR issues.
- Evaluate the school's strategic objectives and obtain information for workforce planning in conjunction with the head teacher.

- Identify the types of skills, knowledge, understanding and experience required to undertake existing and future planned activities.

Facility & Property Management (including H&S):

- Taking the lead on compiling and implementing a premises development plan including a schedule of works, Asset Management Plan and energy conservation.
- Analyse condition surveys and report this to SLT and Governing Bodies
- Through regular line management of the premises staff ensure that the maintenance log and checks are completed as specified, repairs are budgeted for, carried out and progress monitored.
- Ensure the appropriate placing and monitoring of all service contracts
- Advising on all health and safety matters, including measures in the event of emergencies.
- Financially appraise projects for the development of the school.
- Be responsible and report back to the head teacher and governing body on security, maintenance, heating, in house cleaning, catering and other general site services within the premises.
- Ensure inventory register is updated each year and all new items are added to the inventory register.
- To deal with all external agencies, delivering services to the school and to deal with all aspects of tendering. Ensure the supervision of relevant planning and construction processes is undertaken in line with contractual obligations.
- To be responsible for liaison with the premises teams regarding letting of school premises to outside organisations and school staff, the development of all school facilities for out of school use.
- To ensure that the best use is made of the premises personnel.
- To monitor and oversee quality and programme of work by contractors.
- To be the schools point of contact for all major building projects.
- Ensure the continuing availability of utilities, site services and equipment for school users.
- Follow sound practices in estate management and grounds maintenance
- Monitor, assess and review contractual obligations for outsourced school services.
- Ensure a safe environment for the stakeholders of the school to provide a secure environment in which due learning processes can be provided.
- Ensure ancillary services e.g. catering, cleaning, etc., are monitored and managed effectively.
- Seek professional advice on insurance and advise SLT on appropriate insurances for the school and implement and manage such schemes accordingly.

- Ensure the health & safety policy is implemented at all times, put into practice and is subject to review and assessment at regular intervals or as situations change.
- Ensure systems are in place for effective monitoring, measuring and reporting of health and safety issues to the Senior Team, Governors and where appropriate the Health & Safety Executive.

Administration Management:

- Manage the whole school administrative function and ensure the school's administrative systems and structures provide an excellent service and best value for money.
- Design and oversee the maintenance of administrative systems that deliver outcomes based on the school's aims and goals. Identify link processes that interact across the school to form complete systems. Define responsibilities, information and support for staff and other stakeholders.
- Develop process measures that are affordable and that will enable value for money decisions for those managing resources.
- Establish and use effective methods to review and improve administrative systems
- Use data analysis, evaluation and reporting systems to maximum effect by ensuring systems are streamlined to maximise efficiency and avoid duplication.
- Benchmark systems and information to assess trends and make appropriate recommendations.
- Oversee the prepared information by Business Administration staff members, before submission, for publications and returns for the DfES, LEA and other agencies and stakeholders within statutory guidelines.
- Assist in the development of and promotion of a corporative image.

Management Information Systems & ICT:

- Develop and maintain a high quality network and system to meet the present and future needs, ensuring financial implications are planned and budgeted accordingly.
- Ensure legal, security and privacy requirements of the school's database systems and software licences are maintained.
- Ensure an efficient IT backup strategy, appropriate access levels of all users and anti-virus software systems and procedures are maintained.
- Ensure contingency plans are in place in the case of technology failure within the school's business continuity plan.
- Review and update legal, security and privacy notices.
- Ensure that General Data Protection Regulations are updated, applied to all data held and adhered to
- Ensure data collection systems providing information to stakeholders are streamlined to maximise efficiency of the data supplied.
- 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 that the school has a strategy for using technology aligned to the overall vision and plans for the school ensuring value for money.
- Communicate the strategy and relevant policies, including Data Protection for use of technology across the school.
- Establish systems to monitor and report on the performance of technology within the school.

Legal Compliance:

- Ensuring the website is up to date and in line with legal requirements
- Ensuring all tendering and procurement is carried out within the correct legal framework.
- Ensuring all post holders understand their responsibility for GDPR

General

- 1.** The post-holder must carry out his or her duties with full regard to the School's Health and Safety, Equal Opportunities, GDPR and Safeguarding Policies.
- 2.** The post-holder will participate in the school's performance management process and professional development opportunities.
- 3.** The post-holder should have knowledge of and compliance with all school policies and procedures.
- 4.** To play a full part in the life of the school community, supporting its distinctive mission and ethos, and encouraging and ensuring staff and students adhere to school expectations.
- 5.** The post-holder will perform any such duties as are within the scope and the spirit of the job purpose, the title of the post, and its grading.
- 6.** Be responsible to student behaviour and welfare in public places during break, lunch, change of lesson and at the beginning and end of the school day.
- 7.** Participate in professional development opportunities and demonstrate a willingness to develop additional skills and expertise.
- 8.** Keep up to date with current educational developments and legislation affecting your area of expertise.
- 9.** To respect the confidential nature of information relating to the school, students and customers.
- 10.** Treat students, parents and colleagues fairly, equitably and with dignity and respect.

This job description is subject to regular review and can be amended in line with the pay grade.

**School Business Leader
Person Specification**

1. Experience

<i>Essential</i>	<i>Desirable</i>
<ul style="list-style-type: none"> • Managing budgets, financial reporting and procurement. • Working effectively with internal and external partners. • Awareness of H&S. 	<ul style="list-style-type: none"> • Project management. • Working in a strategic role in public or educational sector. • Leadership and management experience in a school, or relevant field outside education. • Involvement in school self-evaluation and improvement planning.

2. Qualifications

<i>Essential</i>	<i>Desirable</i>
<ul style="list-style-type: none"> • Good levels of English Language and Maths. 	<ul style="list-style-type: none"> • Relevant recognised professional qualification in finance, accounting or business administration. • Achieved School Business Manager qualification e.g. DSBM / CSBM.

3. Personal Characteristics

<i>Essential</i>	<i>Desirable</i>
<ul style="list-style-type: none"> • An excellent team player. • Calm and patient under pressure. • Self-aware, perceptive and committed to maintaining confidentiality at all times. • Hard working, energetic and enthusiastic. • Adaptable, flexible and well organised. • Willing to learn. • Demonstrate a commitment to the school vision, aims and ethos, its community and the school improvement agenda. • Commitment to acting with integrity, honesty, loyalty and fairness to safeguard the assets, financial probity and reputation of the school. • Commitment to safeguarding and equality. 	<ul style="list-style-type: none"> • Commitment to further their own professional development and that of others in the team.

4. Skills

<i>Essential</i>	<i>Desirable</i>
<ul style="list-style-type: none">• Track record of managing people.• Effective interpersonal skills.• Ability to prioritise, plan and implement appropriately.• Ability to build positive relationships with a wide range of people.• Ability to deal with people in a professional, assertive and diplomatic manner.• Effective communicator and presenter — verbal and written.	<ul style="list-style-type: none">• Ability to represent school on behalf of Head Teacher.• Excellent attention to detail.• Knowledge of financial management.

5. Knowledge & Understanding

<i>Essential</i>	<i>Desirable</i>
<ul style="list-style-type: none">• Financial management and accounting procedures.• Information management systems.• Resource management and procurement with regard to Best Value principles.• An awareness and understanding of safeguarding responsibilities and implications.• School financial management and Accounting.• Understanding of Schools Financial Value Standard (SFVS).• Personnel procedures and employment legislation.• HR policies/codes of practice/legislation.• H&S policies/codes of practice/legislation.	<ul style="list-style-type: none">• Knowledge of local government and committee processes.• Understanding of using SIMS.• Premises maintenance.