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| Job Description |

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| Job Details |
| **School Name** | St Michael’s C of E School |
| **Job Title** | School Business Manager |
| **Grade** | Grade H/I Depending on experience  |
| **Primary Purpose of Job** | To be responsible for finance, personnel, premises, administration and all matters within the management of the school which are supportive, to but do not involve, the teaching function.To be a member of the School Leadership Team |
| **Responsible to** | Head Teacher/ Deputy Head Teacher |
| **Responsible for** | Administration staff, site staff and other support staff where appropriate  |
| **Principal Responsibilities** | To work with HT, SLT and Governors to ensure that the school meets its educational aims and achieves improved standards of learning and attainmentTo give strategic vision and leadership to all aspects of budget, finance, premises, risk management, health and safety, human resources and support servicesTo have an active role in whole school self-evaluation, strategic and annual planning processes in a non-teaching capacityTo lead, operate, maintain and develop the financial procedures and systems of the school ensuring that legal and safety requirements with regard to people and property and function of the school are maintainedTo be responsible for the school site and its buildings, their maintenance, development and efficient useTo be responsible for keeping abreast of legislation, national guidelines and local arrangements in relation to school finance, personnel, premises, Health and Safety and other related matters; advising the members of the Leadership Team and Governing Body as appropriateTo generate additional income into schoolTo ensure that the school is fully prepared to meet OFSTED and School financial criteriaTo liaise with all relevant external agencies |

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| Main Duties |
| **General** |
|  | Attend Full Governing Body and Resource Committee meetings, advising on matters relating to school  |
|  | Take delegated responsibility for premises and financial decisions following appropriate discussions with the Head Teacher/ Deputy Head Teacher and Governors |
|  | Plan and manage change in accordance with the School Improvement Plan |
| **Finance** |
|  | Liaise with the Head teacher and prepare an annual and three year forecasted budget for the school linked to the Strategic Improvement Plan and predicted funding, pupil numbers etc. |
|  | To manage all aspects of the School’s Bank Accounts and their systems |
|  | To balance bank account monthly and submit appropriate forms to the LA |
|  | To manage complex financial procedures |
|  | Ensure the school has appropriate financial systems and to manage all aspects of these systems in accordance with agreed policies and timetable (termly), ensuring accurate financial records are maintained and reporting on a regular basis to the Head teacher, Leadership Team and Governors to inform decision making |
|  | Monitor how initiatives and changes (planned and unplanned) will impact on the school budget and advise accordingly |
|  | To be responsible for ensuring that the financial transactions in the school are carried out in an appropriate manner and that the financial regulations of the LA, DfE and the school are observed; prepare the SFVS annually  |
|  | To maintain and monitor all school bank accounts, ensuring bank reconciliations are carried out on a monthly basis |
|  | Manage finance on FMS and train or arrange training for others |
|  | Prepare financial forecasts for particular projects and to manage budgets set |
|  | To manage and implement accepted recommendations of audit |
|  | Awareness and understanding of funding streams and to prepare and submit bids to generate additional income |
|  | Manage the tendering of service contracts, monitor insurance policies and ensure school abides by its Best Value strategy |
|  | Review rental/contract expiry dates, where relevant and seek alternatives |
|  | Submit capital bids to the LA, monitor and control capital expenditure on buildings and grounds, placing of contracts, appointment and monitoring of contracts |
|  | Promote school’s activities and premises with view to maximising letting income within agreed policies |
|  | Supporting staff responsible for delegated budgets with procedures which enable them to monitor these budgets |
|  | Monitor utilities costs and introduce cost saving initiatives |
|  | Ensure separation of duties to accord with audit requirements |
| **Premises** |
|  | Oversee the work of premises related staff and ensure that appropriate premises records are maintained |
|  | School Liaison Officer for major capital projects involving attendance and input at pre-contract and site meetings |
|  | Manage school led capital projects ensuring health and safety of pupils and staff |
|  | Line manage the Site Manager and develop a rolling programme for redecoration and refurbishments and identify and prioritise repair and improvement tasks |
|  | Line manage the Site Manager to ensure that the proper maintenance and repair of the school is carried out and progress monitored |
|  | Plan all work within premises team and with outside contractors to minimise disruption to teaching and learning. Maximise, within staffing levels, work done during school holiday time |
|  | Ensure repair and maintenance of school is carried out either within emergency repairs or in-house, as appropriate |
|  | Prioritise projects in line with School Improvement Plan and attend and report to Resources Committee |
|  | Ensure all statutory regulations are adhered in liaison with the site manager  |
|  | Oversee community use of the Hall/Community Room, where relevant |
|  | Improve within budgetary constraints, security measures on site |
|  | Monitor service contracts including cleaning and catering |
| **Administration** |
|  | Oversee, review and develop the administrative services of the school |
|  | Oversee the work of the administrative team ensuring an appropriate administrative, clerical and secretarial service is provided to the school |
|  | Ensure that an effective and appropriate reprographics service is available to all staff in the school |
|  | Encourage the sufficient use of pooled resources and equipment, including, audio-visual and conference equipment and develop maintenance and replacement strategies |
|  | To annually review and update the Critical Incident Plan, Business Continuity Plan and staff emergency contact pyramid |
| **External Relations** |
|  | Manage the hiring of the school premises within regulations |
|  | Ensure that lettings are cost effective |
|  | Liaising with local residents where appropriate |
|  | Responsible for liaison between school and local businesses |
| **Personnel** |
|  | Responsible for the provision of an appropriate staff development programme for support staff managed by SBM, informed by individual annual review within performance management arrangements |
|  | Responsible for carrying out staff appraisals for support staff line managed by SBM |
|  | Responsible for personnel arrangements for staff, e.g. staff sickness |
|  | Responsible for liaison with HR in relation to staffing issues and queries |
|  | Responsible for annual review of administrative staff job descriptions |
| **Health and Safety** |
|  | Work with the Head Teacher, Deputy Head Teacher and site staff to formulate, monitor, implement and review the school’s Health and Safety policy and procedures |
|  | Ensure that all staff receive appropriate Health and Safety training.  |
|  | To ensure all tasks are carried out with due regard to Health and Safety |
| **Admissions**  |
|  | Responsibility for admissions/ waiting lists (Nursery- y6) |
|  | Manage all in year admissions  |
|  | Responsibility for completing all EY funding contracts  |
|  | Manage the induction of new children and families  |
| **Other** |
|  | Understand that all staff have a responsibility for promoting and safeguarding the welfare of children and young people |
|  | To adhere to the ethos of the school by promoting the agreed vision and aims and setting an example of personal integrity and professionalism |
|  | Any other duties as commensurate within the grade in order to ensure the smooth running of the school |
|  | The school is committed to safeguarding and promoting the welfare of young people and expects all staff to share this commitment. It is the individual’s responsibility for promoting and safeguarding the welfare of children he/she is responsible for or comes into contact with. |

The post holder may reasonably be expected to undertake other duties commensurate with the level of responsibility that may be allocated, at the discretion of the Head Teacher and to meet the needs of the school.

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| Version Control |
| **Job Description prepared by:** | R Dawber |
| **Job Description updated:** | 25 March 2024 |

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| Person Specification |

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| Job Details |
| **School Name** | St Michael’s C of E Primary School  |
| **Job Title** | School Business Manager |
| **Grade** | Grade H/I Depending on experience  |

## Stage One

The minimum essential requirements for the above post are as follows. Please try to show in your application form, how best you meet these requirements. Disabled candidates are guaranteed an interview if they meet the essential criteria.

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| Skills and Knowledge | Method of Assessment |
|  | Experience in administrative / finance roles at a senior level | Application Form/Interview |
|  | Proven experience of implementing financial procedures | Application Form/Interview |
|  | Experience of managing and monitoring budgets | Application Form/Interview |
|  | Experience of developing, using and implementing ICT systems and procedures  | Application Form/Interview |
|  | Previous experience of managing a range of staff over a number of work areas | Application Form/Interview |
|  | Evidence of Continuous Professional Development | Application Form/Interview |
|  | Experience of working in school or similar environment | Application Form/Interview |
|  | Knowledge of financial regulations and codes of practice  | Application Form/Interview |
|  | Understanding of budgetary control  | Application Form/Interview |
|  | Basic knowledge and understanding of Education and child protection issues. | Application Form/Interview |
|  | Ability to demonstrate high standards of numeracy and literacy skills | Application Form/Interview |
|  | Ability to communicate effectively verbally and in written form with a wide range of children and adults with varying abilities and needs  | Application Form/Interview |
|  | Ability to work constructively as part of a team and be aware of your own and the wider team objectives and goals  | Application Form/Interview |
|  | Ability to effectively plan and manage your own workload and that of your team to meet deadlines | Application Form/Interview |
|  | Ability to work alone with minimum supervision | Application Form/Interview |
|  | Ability to demonstrate good I.T skills and ability to use Microsoft Packages and basic database programmes | Application Form/Interview |
|  | Ability to accurately record and collate information and data and produce written reports  | Application Form/Interview |
|  | Ability to analyse information and check information against specified criteria | Application Form/Interview |
|  | An awareness of current issues facing schools and education | Application Form/Interview |
|  | An appreciation of the different levels of accountability within the school, Governing Body, LA  | Application Form/Interview |
|  | Proven ability to identify opportunities for improvement in services | Application Form/Interview |
|  | Knowledge of legislation relevant to Safeguarding within a school environment  | Application Form/Interview |
|  | Current knowledge of employment law  | Application Form/Interview |
|  | A good understanding of Health & Safety legislation | Application Form/Interview |
|  | Excellent organisational skills | Application Form/Interview |
|  | Ability to maintain confidentiality | Application Form/Interview |
|  | Very good interpersonal and communication skills in order to be able to negotiate with others | Application Form/Interview |
|  | Adaptable and diplomatic approach to differing situations | Application Form/Interview |
|  | Willingness to be flexible to work outside the normal working pattern when required and to attend events beyond the school day such as Christmas and Summer Fairs  | Application Form/Interview |
|  | Ability to use initiative to respond to and resolve a range of long term problems | Application Form/Interview |
|  | Ability to work under pressure and to set deadlines for self and others | Application Form/Interview |
|  | Excellent project management skills | Application Form/Interview |
|  | Ability to work as part of a team | Application Form/Interview |
|  | Commitment to and the ability to support the distinctive ethos of the school | Application Form/Interview |
|  | A personal and friendly nature | Application Form/Interview |
|  | Proven ability to establish and maintain contact with a broad spectrum of individuals and external agencies | Application Form/Interview |
|  | Maintain confidentiality where appropriate | Application Form/Interview |
|  | An understanding of good practice concerning recruitment | Application Form/Interview |
|  | A willingness to develop, promote and participate in employment policies and procedures | Application Form/Interview |
|  | A commitment to equality of opportunity and fair treatment of all staff and students | Application Form/Interview |
|  | CompetenciesPlease note the school’s competencies, which are considered to be essential for all roles, are in the attached Core Competencies document. | Interview |

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| Experience, Qualifications and Training | Method of Assessment |
|  | CSBM / DSBM or NVQ Level 4 Business Degree or equivalent related professional qualification. | Application Form |
|  | Experience of managing strategic financial plans. | Application Form / Interview |
|  | Experience of managing budgets, financial reporting, procurement and fixed assets. | Application Form / Interview |
|  | Experience of managing teams, HR functions and Health and Safety. | Application Form / Interview |
|  | Experience of the implementation, development, management and operation of administrative systems. | Application Form / Interview |
|  | Excellent numeracy/literacy skills | Application Form/Interview |
|  | Be willing to continue Professional Development | Application Form/Interview |
|  | Willingness to participate in relevant training and development opportunities. |  |

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| Work Related Circumstances | Method of Assessment |
|  | Willingness to constructively challenge the work of self and others to continually improve own team performance. | Application Form / Interview |
|  | This post is subject to an enhanced disclosure and a barred list check from the Disclosure and Barring Service. | Application Form / Certificate |

## Stage Two

This will only be used in the event of a large number of applicants meeting the minimum essential requirements. Please try to show in your application form, how best you meet these requirements.

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| Skills and Knowledge | Method of Assessment |
|  | Knowledge of bank account school procedures.  | Application Form / Interview |

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| Experience, Qualifications and Training | Method of Assessment |
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| Version Control |
| **Person Specification prepared by:** | School’s HR |
| **Person Specification updated:** | 25 March 2024 |

# Core Competencies

These core competencies are considered essential for all roles within this school. Please be prepared to be assessed on any of these during the interview process and, for the successful applicant, throughout the probationary period.

**Developing Self and Others**

Promote a learning environment to embed a learning culture. Support others to develop their skills and knowledge to fulfil their potential. Actively pursue your own development.

**Civil Contingencies**

Bolton Council has a statutory duty under the Civil Contingencies Act 2004 to respond in the event of an emergency. If the Emergency Management Plan is activated, you may be required to assist in maintaining key council services and supporting the community. This could require working outside of routine working hours and working from places other than your normal place of work.

**Equality and Diversity**

Uphold the principles of fairness and the Equality Act 2010 in all undertakings as an employee of the school, including providing a fair, accessible service irrespective of customer’s race, religion, gender, sexuality, disability or age.

**Customer Care**

The ability to fully understand, assess and resolve the needs of all customers including those who present with complex situations, in a manner that respects dignity and expresses a caring and professional image.

**Health and Safety**

Take responsibility for the health and safety of yourself and others who may be affected by your acts or omissions, and comply with all health and safety legislation, policy and safe working practice, including participating in training activities necessary to your post.

**Data Protection and Confidentiality**

Ensure that any personal data or confidential data you hold is kept securely and is not disclosed, whether electronically, verbally or in writing, to any unauthorised third party. Follow school policies and procedures on dealing with personal information and information assets, including the Code of Conduct, Information Management, and ICT Acceptable Use. Personal or confidential data should only be accessed or used for school purposes.

**Fluency Duty**

Should you be required, as a regular and intrinsic part of your role, to speak to members of the public in English, you must be able to converse at ease with customers and provide advice in accurate spoken English, as required by the Immigration Act 2016.

**Working Hours**

The nature and demands of the role are not always predictable and there will be an expectation that work will be required outside of normal hours from time to time.

**Safeguarding**

This School is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all staff and volunteers to share this commitment. Should the role involve working with the above groups, you will be subject to an Enhanced Disclosure and Barred List check by the Disclosure and Barring Service.