

CHESHIRE EAST COUNCIL**JOB DESCRIPTION QUESTIONNAIRE**

JOB TITLE	School Business Manager (Primary School)	JOB REF NO	AAAD5088
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1. BASIC JOB PURPOSE

To provide Business Management and Administrative support to the Headteacher and Governors to ensure best value and the successful and effective operation of the school.

2. MAIN RESPONSIBILITIES

1	Manage the financial operations of the school; ensuring that necessary financial data is available to the Head Teacher and Governors, including preparation and formulation of a school budget in accordance with LMS Regulations, preparing statements and financial records for annual audit, etc.
2	Act as Systems Manager for the administration computer network that operates the Schools Information Management System (SIMS) and Local Resources Management.
3	In co-operation with the Headteacher ensure the implementation of regulations to comply with legislation concerning the employment of staff. (Day to day administration of personnel procedures)
4	Manage the production of statistical data relating to the school; in order to submit reports and returns to Council, Ofsted, DfES, etc as required.
5	Manage the School Office ; and ensure efficient administrative and support systems are in place for the effective operation of the school. Manage clerical staff directly to ensure effective deployment for the benefit of the school.
6	Liaise with caretaking staff for maintenance, cleaning, refurbishment, health and safety, and security, site issues
7	Provide administrative support to Governors' meetings and school parents' association`.
8	Identify fundraising opportunities (sponsorships, external grants, match funding), and administer in order to generate income for the school.
Notwithstanding the detail in this job description, in accordance with the School's/Council's Flexibility Policy the job holder will undertake such work as may be determined by the Headteacher/Governing Body from time to time, up to or at a level consistent with the Main Responsibilities of the job.	

Are there any tasks/duties which the Job Holder carries out only occasionally or at certain times in the year? Yes

OCCASIONAL TASKS**HOW OFTEN
PERFORMED?**

Attend School Governors' Meetings (including staffing & Finance Committee) as and when required

Termly

3. RESPONSIBILITY FOR SUPERVISION/DIRECTION/COORDINATION OF EMPLOYEES

Employees directly supervised by Job Holder

<u>No and FTE</u>	<u>Levels / grades</u>	<u>Types of work</u>	<u>Where based</u>
1	Clerical assistant (0.3)	General clerical and administration, reprographics and other office work	School office

What does the supervision/management of these employees involve? (eg *allocating work, training for the job, assessing performance - see guidance notes*)

The Job Holder has full line management responsibilities for the above job functions - including recruitment, allocation of work and agreeing priorities, monitoring workload, assessing performance and development needs, and informal discipline/grievance issues.

Other Employees supervised by Job Holder (not in a direct line relationship)

<u>No and FTE</u>	<u>Levels / grades</u>	<u>Types of work</u>	<u>Where based</u>
5	Midday Assistants	Setting up tables, assisting at mealtimes with pupils	School
PT – number varies	Cleaners (Employed by CBS)	Cleaning of designated areas of school	School
1	Caretaker	Maintenance of buildings and site	School

What does the supervision of these employees involve?

Recruitment and induction (excluding CBS staff), and day to day absence and performance management, deals with holidays and other personnel issues.

Maintains an overview, responsibility for day to day supervision is carried out by other school staff.

Does the job involve supervision, direction or management of people who are not employees? eg contractors, students on secondment

<u>No and FTE</u>	<u>Levels / grades</u>	<u>Types of work</u>	<u>Where based</u>
	Contractors – grounds maintenance, plumbers, electricians, etc	Maintenance, repairs and refurbishment of school buildings and grounds.	School
variable	Supply teachers to cover for planned and unplanned absence	Teachers	School

What does the supervision of these people involve?

Work allocation and ensuring compliance with contract specifications/work orders. Arranges and oversees maintenance. Specifies contract requirements relating to goods and services. Agrees timescale, monitors work, ensures health and safety and security of site is maintained and log book signed.

Administers the appointment of supply staff to cover absence, as agreed by the Headteacher. General school induction, completion of pay / recruitment documentation etc.

Arranges cover for absent support staff.

Does the Job Holder develop policy or provide advice and information which impacts on the supervision/direction/coordination of employees? YES

The Job Holder is responsible for personnel support within school; ensuring that all staff (including supply and peripatetic teachers) are correctly contracted and remunerated in accordance with school and Council policies and procedures, and with employment legislation.

The Local Area Office send necessary Diocesan Board of Education contracts to staff.

Following advice (where necessary) from appropriate professional agencies (including Personnel Consultancy and Local Area Office) gives advice and information to staff, Head Teacher and Governors on pay, contractual and other personnel policies and issues.

Provides training on financial matters to senior teachers and Governors.

4. RESPONSIBILITY FOR FINANCIAL RESOURCES

Financial responsibility	Value of the financial resource (p.a.)	How often is the duty performed?
Manage / accountable for school budgets (budget holder is Head Teacher) Delegated Budget, Standards Funds and Grants budgets. Responsible for preparation of financial information re school budgets: <ul style="list-style-type: none">– all main budget expenditure (salaries, overheads and utilities, etc);– Imprest Account– Income (triggers and makes claims for long term sickness scheme. Raises Internal and External invoices and recharges– “school fund” (ie, moneys received from parents, etc for school trips and events)	C £506,000 plus grant funds up to C£55,000 C£2,250 C£17,000	On-going

<ul style="list-style-type: none"> - Identifies fundraising opportunities (sponsorships, external grants, match funding), and administers these in order to generate income for the school. 		
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Does the Job Holder develop policy or provide advice and information which impacts on financial resources? YES:

The Job Holder manages the financial operations of the school, including preparation of a school budget in accordance with LMS Regulations, preparing statements and financial records for annual audit, etc.

- Provides information and advice to the Headteacher and Governors when developing policies related to financial administrative procedures
- Gives necessary financial data to Headteacher, Governors and senior staff on budget related matters
- Researches and presents best value options for goods and services.
- Development and maintenance of internal financial procedures manual

5. RESPONSIBILITY FOR PHYSICAL RESOURCES

Physical resource	Nature of responsibility of Job Holder	How often is responsibility exercised?
IT Systems and Information: 1. networked and stand-alone PCs (3): – local databases – school roll; administration (Schools Information Management System – SIMS) and finance (Integrated Business System – IBS), etc – MS Office suite – IBS for purchasing supplies and services	▪ Overall management responsibility (systems manager) for non curriculum based local computerised systems;	On-going
2. manual records: – “back up” copies of school forms and records, etc – financial statements, etc	▪ Maintaining accuracy and confidentiality of data.	
Records and Information: • Pupil records • Financial records, LMS Budget, School Fund, Imprest • Inventory of assets • Personnel and payroll forms	• Develops systems for the collection, storage and security of confidential and personal data. • Drafts and sends out Statements of Written Particulars for all school staff. Drafts and sends out offers of employment • Sets up and maintains	Daily

	<p>confidential, accurate school records either personally or supervises clerical staff.</p> <ul style="list-style-type: none"> • Completes and / or checks forms for authorization by Head Teacher • Prepares financial reports for Governors • Takes minutes at Staffing and Finance Committee Meetings 	Daily
Equipment and Tools: – office equipment such as photocopier, FAX machine, printers, etc	Overall management responsibility for procurement, maintenance, etc.	On-going
Supplies and Stocks: – office and general consumables (eg, cleaning and hygiene materials) and other materials, services, etc required for both school administration and teaching purposes.	Administers all purchase orders and invoices in respect of materials and services for the school.	Daily
Buildings and Premises: – all school buildings and grounds/facilities	Overall administrative responsibility for the maintenance and security of school premises, including daily oversight.	On-going

Does the Job Holder develop policy or provide advice and information which impacts on physical resources? YES

The Job Holder:

1. as systems manager for SIMS, liaises with Council ICT on up-grades, etc;
2. provides necessary information / data for the Head Teacher and Governors on various contracts/SLAs (eg, grounds maintenance, catering, etc) applicable at the school;
3. processes insurance claims arising out of the use of school equipment by staff and students.

6. RESPONSIBILITY FOR IMPACT ON PEOPLE

Task/Duty	Who benefits?	How they benefit?
Managing school administration and finance systems.	School staff, students, parents.	Efficient and organised school conducive to teaching and learning.
Administrative support to the School Governors.	School Governors and parents	Timely implementation of decisions, timely circulation and receipt of information.
Giving advice on a variety of school related matters including admissions and transfers and responding to telephone and personal enquiries	Pupils, parents, professionals, contractors, general public., governors	Accurate information given, enables teaching staff to focus on teaching responsibilities
Supports coordination of Health and Safety of site, buildings	School community and visitors	Safe, hygienic surroundings
Oversee administration of recruitment process for all staff – advertising, letters for interview, obtaining all checks (CRB, medical, OHU, references), notification of appointment and issue of contract.	Staff and potential staff. Pupils and parents	Efficient recruitment service. Suitably qualified and checked staff engaged.
Oversees checking of attendance registers and takes appropriate action on absence; contact parents.	Pupils, parents,	Prompt action taken, good attendance encouraged, potential problems highlighted
Input and manipulation of assessment data for inclusion in Common Transfer Forms (SIMS.net) for pupil transfer, reports for parents, data for Assessment Coordinator (PAT), statutory & other returns for DfES and Council Hall Departments (e.g. Research & Statistics).	Pupils, parents, administration staff in other school, Council Hall Departments, DfES staff.	Timely and accurate data provided in appropriate electronic format.

Does the Job Holder develop policy or provide advice and information which impacts on people? YES

The job holder gives information to the head Teacher and Governors that informs decisions about pupil issues such as attendance, behaviour, medical or social issues.

7. KNOWLEDGE

Type of knowledge	What knowledge is essential?	Why are these needed?	How is it normally acquired?
Specialist Knowledge and qualifications	<ol style="list-style-type: none"> 1. Finance/Accountancy 2. Personnel procedures 3. General school Administration 4. ICT skills and knowledge 	<p>Budget management General and personnel administration</p> <p>Network management and upgrades</p>	<p>Certificate of School Business Management (CSBM) NVQ Level 4 equivalent.</p> <p>+ 3 to 5 years experience of financial administration</p> <p>On- and off-the-job training and experience</p>
Numeracy and literacy	<p>Numeric literacy, ability to interpret and formulate data, make projections and recommendations and calculate the impact of changes in costs.</p> <p>Ability to research and analyse information</p>	<p>Prepares and presents a workable budget to Governors.</p> <p>Estimates and calculates effect of changes in National Insurance levels, pay increases etc when budget setting.</p> <p>Uses formula for allocation of budget to section heads</p>	<p>NVQ 3 or equivalent standard + 3-5 yrs experience in financial administration with some supervisory experience</p>
IT Systems and Packages	<p>Operation of networked and stand-alone PCs - local databases for school roll; administration (Schools Information Management System – SIMS); finance (Integrated Business System – IBS), MS Office suite.</p>	<p>Essential tools for performing the job</p>	<p>On- and off-the-job training and experience</p> <p>ECDL</p>

Policies and Procedures	<ol style="list-style-type: none"> 1. Policies of the school, particularly in relation to Administration, Finance and Personnel. 2. Council policies and procedures - particularly Education and Community in general; Financial Regulations and Personnel in particular 	To ensure that all Administration, Finance and Personnel functions comply with established policies and procedures.	On- and off-the-job training and experience
Organisational	Education and Community in general; schools' support services in particular	To understand the range of support services available to the school	On- the-job experience
	General knowledge of CCC Education Service and support services (payroll, personnel, AEO's etc)	To understand who does what, where to obtain information & resolve problems	
	Knowledge of other professionals and partner organizations associated with school	To know where to contact them and associated procedures	
	Knowledge of financial regulations, procedures and legal requirements; offering advice to the Governing Body	To advise Governors on financial legal and procedural matters	
	Knowledge of school buildings, local contractors & Council Buildings Management	To facilitate site maintenance	
	Registration, admission and transfer procedures for all pupils	Enable effective administration of pupil procedures.	
Legislation	General knowledge of Education Acts, Children's Acts, etc	Underpinning legislative framework governing the business of the school.	On- the-job training
Management	Supervisory practice of managing a small team of staff	Management of clerical staff.	Formal and informal training and experience

How long would it take for a Job Holder to become fully operational?

Within 3 to 6 months the jobholder should be operating pupil, financial and personnel systems but it would take a year to experience the full academic year and financial cycle and acquire the specific local and council knowledge including support mechanisms and develop range of contacts. Certificate of School Business Management 12 – 18 months

8.MENTAL SKILLS

a) What sort of situations/problems does the Job Holder typically have to deal with?

Example:

Managing school budgets and balancing competing demands for financial resources to ensure that sufficient funds are allocated to meet teaching/curriculum needs.

Example:

Responding to parental issues / complaints as school front line service and taking appropriate measures to seek resolution of the matter.

b) Give an example of the most difficult or demanding situation/problem the Job Holder has to solve.

Example:

Preparing detailed budget proposals; including all main budget expenditures (salaries, overheads and utilities, etc) and income (school fund, lettings, sponsorships). : Analysis of the income available to the school and planning and setting the budget for approval by the Governing body, based on; monies available, previous experience and historical data. Job holder, in liaison with the Headteacher ensures that the budget reflects the School priorities as detailed in the school Development Plan and also sets aside monies for future expenditure on school plans.

c) Approximately how often would the example in (b) occur?

Annual but ongoing through the year

Give details below of the mental skills required in the job and reasons why they are needed.

Mental Skill	Why Needed?
Planning	<ol style="list-style-type: none">1. Setting budgets in accordance with priorities for expenditure to meet present and future school development plan.2. Determining clerical staff (direct line management) and caretaking staff (supervisory) workload priorities.
Fact-finding/Analysis	<ol style="list-style-type: none">1. Determining budget requirements for different account headings (ie, salaries, overheads, contracts, etc)2. Analysing actual spend vs. budget, and determining causes of variances3. Identifying appropriate systems for school administration purposes – usage/functionality, software, availability, etc.4. Identifying and resolving administrative network problems5. Determining where financial errors have occurred and taking steps to have them rectified6. To import best practice in order to improve school systems and procedures.7. Analysis of data to provide reports and statistics.
Creativity	<ol style="list-style-type: none">1. Contributing to the development of the school prospectus, etc.
Judgement	<ol style="list-style-type: none">1. Determining best value/Value for Money of suppliers of school

	<p>materials, services, etc</p> <ol style="list-style-type: none"> 2. Deciding appropriate route for front line parental complaints / issues 3. Effective deployment of clerical staff
Development and design	School administration systems including financial reporting systems to meet the needs of school

9. INTERPERSONAL AND COMMUNICATION SKILLS ESSENTIAL FOR THE JOB

Skill	Used for?	With whom?
Tact/Diplomacy	Responding to enquiries, demands, etc for information, support and advice.	Governors, teaching and support staff, parents and students.
Supervision	<ul style="list-style-type: none"> ▪ Managing and motivating ▪ On-the-job training and development ▪ Recruitment and Induction of directly managed staff. (see Section 1) 	<p>Office Clerical staff.</p> <p>Overview of other staff ; MDA's/ Caretaker / Cleaners</p>
Negotiation skills	<ul style="list-style-type: none"> ▪ Work allocation, dispute/ grievance resolution, etc. ▪ Obtaining best price/value for money in purchases of school materials and services. 	<ul style="list-style-type: none"> ▪ Support staff ▪ Suppliers
Written skills – High standard of presentation and accuracy essential. Some documents highly confidential.	<ul style="list-style-type: none"> • Statements of Written Particulars and job advertisements • Draft correspondence on behalf of Head Teacher • Set up of standard letters • Minutes, reports and summaries for Governors and other meetings • Giving clear, practical instructions • Producing financial reports, 	Parents, governors, staff, outside agencies, Head teacher, suppliers, contractors, area office
Oral skills – tact, diplomacy and sensitivity required	<ul style="list-style-type: none"> • To deal with more complex calls referred by other school staff. • To give precise and accurate instructions • Obtain and give information, advice and help 	Pupils, parents, staff, professionals, education staff, contractors, suppliers, governors, general public
Persuasion and negotiation with tact and diplomacy	<ul style="list-style-type: none"> • To obtain best price, agree suitable timescales, after sales service according to specific school requirements • To engage the services of supply 	<p>Contractors, suppliers, outside agencies, staff, parents.</p> <p>Supply and replacement staff</p>

	<ul style="list-style-type: none"> and replacement staff To impart unwelcome information to parents, eg, enforced school closures. 	
Advisory	<ul style="list-style-type: none"> Relay advice on procedural personnel issues including interpretation of rules and regulations Servicing of governors' sub-committee and other meetings Advise Governors on procedural and legal requirements of meetings 	School staff and Governors.

10.PHYSICAL SKILLS ESSENTIAL FOR THE JOB

Physical skill	Used for?	Any precision/speed requirements?
Hand/eye co-ordination and dexterity	Operating PC keyboard. Integral part of the role.	

11.INITIATIVE AND INDEPENDENCE

Allocation of work

a) How is work allocated to the Job Holder?

School development plan; school schedules and calendar. There are delegated tasks which are discussed with the Head Teacher. The nature of the job means that the job holder has responsibility for running the school office and therefore, once a plan has been agreed for key tasks, the job holder progresses these by use of own initiative. The Head Teacher checks progress on a regular basis.

b) What is a typical cycle for allocating work to the Job Holder eg hourly, daily, weekly?

Annual cycle for budgets, different cycle for academic year. Most routine work is cyclical with known deadlines, eg weekly etc, other work is reactive to issues as they arise – telephone, incidents, staff requests, callers etc. Special projects are requested by Head teacher on ad hoc basis

Scope for initiative

c) How much freedom/discretion does the Job Holder have:

to change the way work is done? (e.g. recommending changes in policy, procedures, resources)

The Job Holder exercises significant freedom and discretion within the framework of the priorities within the school development plan; regular daily liaison with the Head teacher, on any priorities/issues.

to allocate their time to duties?

The Job Holder has operational day to day freedom to determine duties and priorities, within the framework of the school development plan / school calendar / and Headteacher priorities .

d) What is the level of guidance/instruction available?

School development plan; school policies and procedures; Council, and Education and Community policies and procedures. Job holder is relied upon to offer interpretation of these for colleagues and Governors (after taking necessary advice where appropriate).

e) What sort of direction, management or supervision is given to the Job Holder?

Regular informal and formal briefings / contact with Head Teacher to agree common goals for events and tasks. Expected to use initiative to deal with some unexpected issues. The Head Teacher will be available for advice and guidance on serious problems.

f) Give three examples of problems or decisions the Job Holder would be expected to deal with themselves without reference to a supervisor/manager. How often do these occur?

Expected problem	Nature of available guidance	Typical Frequency
Resolving queries and errors in salary payments to teaching and support staff, made by Council Payroll Services.	Council policies; Job Holder's experience	Monthly
Managing the Administration computer system and network; including installation of up-grades, etc.	Council policies; Job Holder's experience	Monthly

Unexpected problem	Nature of available guidance	Typical Frequency
School closures due to oil shortage, power failure, water cut off etc. The job holder would take initiative to get the decision re school closure made and then take steps to implement.	Experience, precedents, knowledge of procedures	Occasional

g) Give two examples of problems or decisions the Job Holder would be expected to refer to their supervisor/manager. How often do these occur?

Problem or decision	Point of referral	Typical
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		Frequency
Responding to parental enquiries / issues relating to Teaching and Learning.	Refer to Headteacher	Several times a term
A serious disciplinary matter that could result in formal disciplinary action (ie, a Final Written Warning or Dismissal) being taken against a member of the support staff.	Head teacher	Occasional

12.PHYSICAL DEMANDS

Physical Demand	Typical Duration	How often?	Other details (eg how heavy?)
Sitting at keyboard/desk		Throughout the day	

13.MENTAL DEMANDS OF THE JOB

Nature of task	Mental Demand	Duration	Frequency
<ul style="list-style-type: none"> ▪ Preparing financial budgets, statements, reports, etc ▪ Up-grading computer systems 	Concentration – ensuring accuracy, attention to detail.	Up to several hours per occasion	On-going
<ul style="list-style-type: none"> • Issue of Statements of Written Particulars • Preparation and formulation of budgets • Monitoring and checking budget statements including year end and following up discrepancies • Maintaining financial records • Reconciliation of imprest • Overseeing cash handling • Completion of staffing forms • Taking Minutes of Finance and Staffing committee Meetings. • Manages the processing of invoices, raising orders & invoices • Manages the maintenance of pupil and staff records (computer and manual) • Extraction of data for statistical returns and 	Concentration, accuracy & attention to detail, awareness & alertness, checking the work of others and identifying where errors have occurred. confidentiality of information. Listening and interpreting information		

compilation of reports.			
Dealing with visitors and responding to more complex phone calls	Awareness, alertness to security issues, Attention to detail		

To what extent is the job subject to work-related pressures e.g. regular deadlines, frequent interruptions, conflicting demands?

Nature of pressures /interruptions	Source	For how long?	How often?
Deadlines	<ul style="list-style-type: none"> ▪ Preparing/setting budgets and financial statements ▪ Reconciling accounts. ▪ Governors' meetings ▪ Government and LEA returns ▪ Monthly payroll documentation, pupil and other statistical returns eg form PLASC, year end returns. ▪ Job holder responds to statutory requirements for submission of statistical and other information. ▪ Governors meeting cycle. 		<ul style="list-style-type: none"> ▪ Annually ▪ Monthly ▪ Termly ▪ Annually/Monthly
Conflicting demands	<p>Teaching staff demanding immediate priority/attention to supporting their curriculum needs – either by Job Holder or by member of support staff</p> <p>Job holder has to mentally switch between a wide range of enquiries, respond to staff needs and meet unexpected situations arising during the working day.</p>		Regularly
Interruptions	<p>Telephone calls from suppliers, parents, etc.</p> <p>Requests for information and advice – from teaching and support staff</p>	Few minutes	Regularly

If the Job Holder is subject to any other form of mental demand, please give details below. **NONE**

14.EMOTIONAL DEMANDS

Nature of the task being performed by Job Holder.	Behaviour/source of the emotional demand	Frequency (per day/wk/month)
Responding to enquiries and needs of visitors and callers	<ul style="list-style-type: none"> Parents, who can be angry, aggressive/abusive, etc Students, who can be abusive 	Regularly
Resolving disputes/grievances	Support staff, who may be upset, angry, etc	Occasionally
Typing up reports and entering data re; staff on pupils that is highly confidential	Privy to sensitive and confidential information, and awareness of the need for strict confidentiality	Few times a year

15.WORKING CONDITIONS

a) In what kind of places does the Job Holder normally work (eg office, library, gardens, clients' homes)?

If more than one, give approximate proportion of time in each.

Location of work	Proportion of time
School buildings	100%

b) If the Job Holder works outside, are they expected to work regardless of the weather or are alternative arrangements made eg work on other duties?

Not Applicable

c) What unpleasant environmental working conditions or behaviour from other people are met in performing the job? (See guidance notes for examples)

Working Condition or Behaviour from other people	How long does it last at any one time?	How often does it typically occur?
Verbal abuse – from students and parents	Few minutes	Occasional

d) What protection is offered (if any) e.g. against adverse weather (clothing, shelter), against infection, security measures etc.

Not Applicable