

# **JOB PROFILE**

## **PARKWOOD HALL CO-OPERATIVE ACADEMY BUSINESS MANAGER**

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### **1. SALARY**

Hay Scale Band E: Point 47 (£41,551) to Point 55 (£49,023) with pay awards and bonuses linked to appraisal and performance.

The post is full time, 52 weeks per year, with 6 weeks paid holiday per year (to be taken in accordance with the needs of the school and the demands of the role).

### **2. LINE OF RESPONSIBILITY**

2.1. The Business Manager will be directly responsible to the Principal.

### **3. JOB PURPOSE**

The Business Manager is responsible for:

- 3.1. The overall leadership and strategic management of the Academy's financial, business, administration, premises (including cleaning) and catering services. This includes overseeing the development and effective operation of systems and services within these areas and ensuring their compliance with national and local legislation, guidelines and requirements.
- 3.2. In the capacity of Chief Finance Officer, overseeing, organising and managing Academy finance, including that of its extended facilities [in accordance with the requirements of the EFA Academies' Financial Handbook] together with the administration of payroll and pension-related functions.
- 3.3. Providing support to the Principal, in his role as Chief Accounting Officer, in ensuring that value for money is achieved at all times in the delivery of the Academy's aims and objectives, and that the financial operation of the trust is compliant with EFA rules, companies' legislation and Charities Commission requirements.
- 3.4. Promoting the highest standards of business ethos and strategically ensuring the most effective use of resources in support of the Academy's learning objectives.
- 3.5. Assisting the Governing Body, the Principal and the School Leadership Team [SLT] in establishing the policies, systems and procedures through which the Academy's aims and objectives will be achieved, including development of strategic and resource plans.
- 3.6. Advising on compliance with legislation and guidance including financial probity, safeguarding requirements, employment law, pay & pension issues and health and safety.
- 3.7. Overseeing arrangements for both internal and external audits and ensuring that company records and administration are carried out in accordance with requirements and advising Trustees as necessary. (see also 3.11 below).

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- 3.8. The Line Management of a number of staff falling under this postholder's remit including their induction, training and appraisal.
- 3.9. In conjunction with the Principal and his/her Executive Assistant all day- to-day public relation issues.
- 3.10. Supporting and encouraging the Academy's ethos and its objectives, policies and procedures.
- 3.11. Carrying out the role of Company Secretary for Parkwood Hall Co-operative Academy Trust
- 3.12. The School Business Manager promotes the highest standards of business ethos within the administrative function of the school and strategically ensures the most effective use of resources in support of the school's learning objectives.
- 3.13. The School Business Manager is responsible for the Financial Resource Management, Administration Management, Management Information and ICT, Human Resource Management, Facility and Property Management, Health and Safety Management of the School.

#### **4. DUTIES AND RESPONSIBILITIES**

- 4.1. Main duties and responsibilities are indicated below. Other duties of an appropriate level and nature may also be required, as directed by the Principal. Please note that the post holder may be required to work outside of normal Academy working hours for extended school status activities, Academy events, meetings and emergencies.

#### **5. CONDITIONS OF EMPLOYMENT**

- 5.1. The above responsibilities are subject to the general duties and responsibilities contained in the written statement of conditions of employment [the Contract of Employment].
- 5.2. S/he is required to support and encourage the Academy's ethos and its objectives, policies and procedures as agreed by the Governing Body.
- 5.3. S/he will uphold the Academy's policy in respect of Child Protection and Safeguarding matters.
- 5.4. S/he will be subject to all relevant statutory and institutional requirements.
- 5.5. S/he may be required to perform any other reasonable tasks, after consultation.
- 5.6. This Job Description allocates duties and responsibilities but does not direct the particular amount of time to be spent on carrying them out and no part of it may be so constructed.

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5.7. This Job Description is not necessarily a comprehensive definition of the post. It will be reviewed on an annual basis and it may be subject to modification at any time after consultation with the postholder.

5.8. All members of staff are required to participate in the Academy's Appraisal Scheme.

#### **6. DETAILED JOB SPECIFICATION**

6.1. Leadership and Strategy S/he will:

- Attend Strategic Leadership Team, Full Governing Body and appropriate Governors' sub-committee meetings
- Negotiate and influence strategic decision making within the School's Leadership Team
- In the absence of the Principal, in collaboration with the Deputy Principals, take delegated responsibility for Financial and other decisions.
- Plan and manage change in accordance to the Academy's Development Plan.
- Understand the effects and implications of government policies and company and charity legislation for current and future initiatives and ensure that resources are organised and used appropriately.
- Manage the financial implications of human resources, ensuring effective deployment of staff to meet the current and future needs of the Academy.
- Positively promote the Academy and its profile to a range of audiences including the local community.
- Keep up to date with developments and changes in legislation and guidance, and communicate appropriate information to colleagues, Directors and members of Governing Body.
- Advise the Principal, the Governing Body and its Committees, as appropriate.

6.2. Finance and Accounting S/he will:

- Hold the role of Chief Finance Officer as defined in the Academies Financial Handbook.
- Prepare the Academy's annual Budget in consultation with the Principal & the Finance Director and submit it to the Governing Body for approval.
- Monitor income and expenditure in relation to the Academy's Budget and produce monthly reports for the Principal and the relevant Governors' Sub-Committee/s.
- Identify and inform the Principal and Governors of significant variances to the agreed budget, outlining reasons and options available for corrective action.
- Advise the Principal and/or Governors if fraudulent activities are suspected or uncovered.
- Maintain a strategic Financial Plan that indicates trends and requirements of the Academy's development plan and which will inform future years' budgets.
- Pursue and maximise income and sponsorship generation opportunities including appropriate investments, the preparation and submission of applications and bids and fundraising.

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- Manage, negotiate and monitor all contracts, leases, service level agreements, and relationships with external contractors.
- Be conversant with the general principles of taxation applicable to the Academy and the financial implications of charitable status.
- Ensure that budget holders are provided with monthly updates of their accounts and advise them on matters relating to their budget/s.
- Ensure that all Academy accounts and income and expenditure reports are prepared in accordance with the EFA financial regulations and, in collaboration with the Academy's Finance Officer, prepare accounts for submission to the Academy's External Auditors.
- Arrange and coordinate the annual audit, liaising with all parties involved and ensuring that the year-end financial statements conform to the required standard and are submitted to Companies House and the EFA in good time.
- Maintain and oversee all bank accounts including the Academy's credit card/s, completing monthly reconciliations and reporting banking errors to the Principal, or the Governors' Finance and General Purposes Committee as appropriate.
- With the Academy's Finance Officer and the Finance Director, ensure that the Academy's Financial Procedures Manual is reviewed at least annually and updated as necessary so that it reflects the requirements of the DfE in the Academies Financial Handbook as provided by the EFA and identifies developments in systems or processes and to ensure that documentation is being maintained to support the procedures contained within the Manual.
- Identify developments in systems or processes and maintain documentation to support manual procedures.
- Review issues identified and propose resolution to address weaknesses, where necessary, in the Academy's Financial Procedures.
- Ensure compliance with the Internal Controls framework and identify and escalate instances of non-compliance to support the work of the Responsible Officer in performing periodic reviews of transactions.
- Ensure accurate VAT accounting and payment, and that VAT reclaim returns are submitted, as required.
- Ensure accurate cashflow projections and oversee all elements of cash handling including collections and disbursements, banking and security, fundraising and Academy trips.
- Be responsible for the completion of the Academy's Payroll, and ensuring all forms including timesheets, new starter/leaver/variation forms and annual returns are submitted within required deadlines.
- Monitor the payment of salaries by the Academy's Payroll Provider, liaising with the Provider as required.
- Be responsible for the placement of orders ensuring they are processed through the Academy's computerised finance accounting package.
- Scrutinise and attend to the payment of all invoices and statements of account in conjunction with the nominated staff members.
- Take strategic responsibility for the issue of Academy invoices and ensuring their prompt payment.

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- Supervise the Academy's computerised finance accounting package ensuring that required back-ups are carried out and kept securely.
- Carry out and keep analyses of costs and other statistical information.
- Develop revisions and improvements to systems and controls in collaboration with the Finance Officer.
- Ensure that all necessary returns, reports and documentation are completed accurately within time constraints including health and safety reporting requirements, claims, bids, reports to Governors, and statistical returns [internal and external].
- Review annually the School's Charging Policy, in conjunction with the Finance Officer and Finance Director and make recommendations as appropriate.
- Ensure good records are maintained and that when documents are archived they can be identified and retrieved.

#### 6.3. Human Resource Management S/he will:

- Ensure that all the necessary financial data required for payroll, the Teachers' Pension and Local Government Pension agencies is submitted when:
  - A new appointment is made.
  - When changes are made to an existing member of staff's terms and conditions.
  - When a member of staff's employment terminates.
- Ensure all relevant assessments are completed and resulting outcomes implemented in relation to HMRC requirements.
- Ensure that all staff personnel details relating to salaries and pensions are passed to the School Development Officer (HR) for inclusion in secure personnel files.
- Be proactive in the development and implementation of succession planning in conjunction with the Principal.
- Ensure the accurate and efficient management of information and contributions to pension schemes and associated services.
- With the School Development Officer (HR) ensure effective and efficient management of recruitment for all staff posts.
- With the School Development Officer (HR), monitor the relevant legal, regulatory, ethical and social requirements and the effect they have on the Academy and staff.
- With the School Development Officer (HR), ensure people have a clear understanding of the policies and procedures and the importance of putting them into practice.
- With the HR Manager, monitor the way policies and procedures are actioned and provide support where necessary
- Seek and make use of specialist expertise within the Academy and in relation to HR issues
- With the SLT, evaluate the school's strategic objectives and obtain information for workforce planning
- With the SLT, identify the types of skills, knowledge, understanding and experience required to undertake existing and future planned activities

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#### 6.4. Administration S/he will:

- Establish and use effective methods to review and improve administrative systems within the Academy.
- Ensure that all necessary returns, reports and documentation are completed accurately within time constraints including health and safety reporting requirements, claims, bids, reports to governors, and statistical returns [internal and external].
- Collate information, statistics and prepare reports as required by the Principal and the Governing Body.
- Undertake responsibility for all necessary administration relating to all areas within her/his remit.
- Undertake responsibility to ensure that all manual and computerised records and filing systems relating to all areas within her/his remit are maintained as required.
- Process, input, extract and analyse information relating to all areas within his/her remit from the Academy's database system/s.
- Ensure compliance with data protection regulations.
- Deal with correspondence relating to all areas within his/her remit promptly and as required.
- Liaise with the Principal, SLT, ICT Manager and other staff, as appropriate, on ICT procurement.
- Ensure Contingency Plans are in place in case of technological failures.
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#### 6.5. Estate and Services S/he will:

- Take strategic responsibility for the safe maintenance of the Academy site and buildings including all aspects of security.
- Establish, monitor and review maintenance schedules and plans for premises upkeep and refurbishment and help ensure the efficient operation of all facilities.
- In discussion with the Principal and SLT, establish contingency plans in case of emergencies including power cuts, flooding and fire.
- Strategically manage the letting of Academy premises and other activities in order to maximise income.
- Take strategic responsibility for the Academy's Asset Registers ensuring that they are maintained and regularly updated.
- Be directly involved in the planning and development of any extensions to the Academy building and premises and any resulting construction works.
- Ensure the supervision of relevant planning and construction processes is undertaken in line with contractual obligations
- Ensure the safe maintenance and security operation of all school premises
- Strategically manage the maintenance of the school site including the purchase and repair of all furniture and fittings
- Ensure the continuing availability of utilities, site services and equipment
- 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

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- Ensure the maintenance of all Academy insurances in all forms including assessments, claims and administration.
- Establish and implement an effective damage and loss-prevention strategy to reduce insurance and overall costs to the budget.
- Ensure, in conjunction with the Principal and relevant staff, that all health and safety procedures and requirements are being resourced and met.
- Ensure that systems are in place for effective monitoring, measuring and reporting of health and safety issues
- Strategically manage the letting of school premises to external organisations, for the development of the extended services and local community requirements.

#### 6.6. Management Information Systems and ICT S/he will:

- 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
- Ensure resources, support and training are provided to enable work colleagues to make the best use of available ICT including teaching, learning and assessment systems
- Ensure contingency plans are in place in the case of technology failure
- Ensure data collection systems providing information to stakeholders are streamlined to maximise efficiency of the data supplied

#### 6.7. Health and Safety S/he will:

- Ensure the School's written Health and Safety Policy Statement is clearly communicated and available to all people
- Ensure the Health and Safety Policy is implemented at all times, put into practice and is subject to review and assessment at regular intervals or as situations change
- Enable regular consultation with people on Health and Safety issues
- Ensure systems are in place to enable the identification of hazards and risk assessments
- 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
- Ensure the maximum level of security consistent with the ethos of the School

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- Together with the Principal and SLT, oversee and ensure that statutory obligations are being met for pupils with special educational needs, ensuring that financial and supporting services are adequate for their diverse needs

#### **7. GENERAL**

S/he will:

- Attend Academy events as required.
- Participate in Academy emergencies, in conjunction with members of SLT, including the implementation of effective evacuation and search procedures as required.
- Attend training sessions and meetings as required
- Seek, consider, and act upon professional support and advice as required.

#### **8. KEY ORGANISATIONAL OBJECTIVES**

The postholder will contribute to the School's objectives in service delivery by:

- Ensuring enactment of Health and Safety requirements and initiatives, as directed.
- Ensuring compliance with Data Protection legislation.
- Operating within the Academy's Equalities Framework at all times.
- Showing commitment and contribution to improving standards and outcomes for students,
- Acknowledging and implementing customer care and quality initiatives.
- Contributing to the maintenance of a caring and stimulating environment for children and young people.

#### **9. CONDITIONS OF SERVICE**

Governed by the National Agreement on Pay and Conditions of Service (Hay) supplemented by any local conditions as may be agreed by Governors.

#### **10. SPECIAL CONDITIONS OF SERVICE**

- 10.1. Because of the nature of the post, candidates are not entitled to withhold information regarding convictions by virtue of the Rehabilitation of Offenders Act 1971 [Exemptions] Order 1975, as amended. Candidates are required to give details of any convictions on their Application Form and are expected to disclose such information at the Appointment Interview.
- 10.2. Because this post allows substantial access to children, candidates are required to comply with procedures in relation to Police Checks. Prior to taking up the post, the successful candidate will be required to give written permission to the School to ascertain details from the Police regarding any convictions against them and, as appropriate, the nature of such convictions.

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**11. EQUAL OPPORTUNITIES**

11.1. The postholder will be expected to carry out all duties in the context of and in compliance with the School's Equal Opportunities Policies.

**12. PROBATIONARY PERIOD**

12.1. The Probationary Period for this post is 6 months.

**13. NOTICE PERIOD:**

13.1. The Notice Period will be 3 months.

Date of Issue: \_\_\_\_\_

Signature of Postholder: \_\_\_\_\_

Signature of Principal: \_\_\_\_\_

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## ACADEMY BUSINESS MANAGER: PERSON SPECIFICATION

ESSENTIAL	DESIRABLE
<p><b>Qualifications and Experience:</b></p> <ul style="list-style-type: none"> <li>• Recognised management/business degree or professional qualification/s and/or significant experience in field.</li> <li>• Evidence of finance, business and administrative management experience to support the day to day operation of an academy / company within financial constraints.</li> <li>• Evidence of being an effective member of an academy /company strategic leadership team.</li> <li>• Experience of managing strategic financial plans and influencing decision making.</li> <li>• Experience of managing budgets, generating income/sponsorship opportunities, procurement and fixed assets.</li> <li>• Experience of strategic management of managing an academy /company's human resources function.</li> <li>• Experience of managing change and implementing new systems/ procedures/ controls.</li> <li>• Evidence of effective leadership and line management of staff including a team.</li> </ul>	<p><b>Qualifications and Experience:</b></p> <ul style="list-style-type: none"> <li>• Recognised accounting qualification.</li> <li>• School Business Manager specific qualification i.e.: Fellow of NASBM, DSBM, CSBM.</li> <li>• Experience of strategic management within a special school or similar establishment.</li> <li>• To have experience and understanding of the working of a governing body, and company and charity law, regulations and reporting requirements.</li> <li>• Experience and knowledge of premises management, maintenance and repair including the ability to establish priorities.</li> <li>• Member of National Association of School Business Management.</li> </ul>
<p><b>Knowledge and Skills:</b></p> <ul style="list-style-type: none"> <li>• Ability to build and form good relationships with students, colleagues and other professionals.</li> <li>• Able to lead, develop and motivate a team of staff, delegating duties as required.</li> <li>• Ability to work constructively as part of a team, understanding Academy roles and responsibilities including own.</li> <li>• Excellent verbal and written communication skills appropriate to the need to communicate effectively with colleagues, students and other professionals.</li> <li>• Ability to proficiently use office computer and finance software including word-processing, spreadsheet, database/s and internet systems.</li> </ul>	<p><b>Knowledge and Skills:</b></p> <ul style="list-style-type: none"> <li>• Knowledge and understanding of EFA financial requirements.</li> <li>• Knowledge of company and charity legislation, regulations and reporting requirements.</li> <li>• Knowledge of and ability to use mainstream accounting packages (e.g. Sage software)</li> <li>• Knowledge and understanding of educational enterprise issues.</li> <li>• Awareness of principles and practice in relation to building services, for example protection of personnel and buildings from fire, energy management and conservation.</li> </ul>

## ACADEMY BUSINESS MANAGER: PERSON SPECIFICATION

ESSENTIAL	DESIRABLE
<ul style="list-style-type: none"> <li>• Ability and knowledge to produce budgetary estimates, reports, cash flow and financial and statistical summaries, ideally combined with operational experience.</li> <li>• Good working knowledge of principles and methods of financial control and reporting, and their adaptation to various purposes, including the preparation of financial accounts.</li> </ul>	
<ul style="list-style-type: none"> <li>• Working knowledge of law with regard to health and safety legislation, contracts, freedom of information act, copyright and data protection and tendering processes including OJEU</li> </ul>	
<p><b>Personal Qualities:</b></p> <ul style="list-style-type: none"> <li>• Excellent interpersonal and influencing skills with ability to maintain strict confidentiality.</li> <li>• A diplomatic and patient approach.</li> <li>• Initiative and ability to prioritise own work and that of others to meet deadlines when under pressure.</li> <li>• Able to follow direction and work in collaboration with leadership team.</li> <li>• Able to constructively challenge self and others to continually improve own and team performance.</li> <li>• Able to work flexibly, adopt a 'hands on' approach, and respond to unplanned situations.</li> <li>• Ability to evaluate own development needs and those of others and to address them.</li> <li>• A willingness to seek specialist advice and awareness of where to seek it.</li> <li>• Able to attend evening meetings as required.</li> </ul> <p>Efficient and meticulous in organisation.</p> <ul style="list-style-type: none"> <li>• Commitment to the highest standards of child protection and safeguarding.</li> <li>• Recognition of the importance of personal responsibility for health and safety.</li> </ul>	

## ACADEMY BUSINESS MANAGER: PERSON SPECIFICATION

<b>ESSENTIAL</b>	<b>DESIRABLE</b>
Commitment to the Academy's ethos, aims and its whole community.	