

## St Charles and St Mary's Federation of Schools SBM Job Description

### St Charles Catholic Primary School

Telephone: 0208 969 5566

E-mail: [info@st-charles.rbkc.sch.uk](mailto:info@st-charles.rbkc.sch.uk)

Website: [www.st-charles.rbkc.sch.uk](http://www.st-charles.rbkc.sch.uk)



### St Mary's Catholic Primary School

Telephone: 0208 969 0321

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<b>Job Title</b>	School Business Manager
<b>Salary Grade</b>	P07 Pt 46 £59,772 FT Equivalent
<b>Hours</b>	22.5 hours per week (3 days a week)
<b>Contract type</b>	Permanent
<b>Reporting to</b>	Executive Head Teacher (EHT) & Governing Body
<b>Responsible for</b>	Admin & Finance Teams (x 4) Premises Teams across the Federation (x 2)
<b>Job Purpose</b>	<p>The School Business Manager (SBM) is responsible for managing the strategy and operation of the business functions of the Federation, including financial management, health and safety, compliance, support of HR function and administration.</p> <p>The post holder will advise on and implement the day-to-day support that enables the Federation to operate effectively and efficiently, and is a member of the Senior Leadership Team.</p>
<b>General Duties &amp; Responsibilities</b>	<p><b>Financial Resource Management</b></p> <ol style="list-style-type: none"> <li>1. Evaluate information and consult with the SLT and Governors to prepare a realistic and balanced budget for school activity</li> <li>2. Submit the proposed budget to the Head and Governors for approval and assist the overall financial planning process</li> <li>3. Discuss, negotiate and agree the final budget</li> <li>4. Use the agreed budget actively to monitor and control performance to achieve value for money</li> <li>5. Identify and inform the Head and Governors of the causes of significant variance and take prompt corrective action</li> <li>6. Propose revisions to the budget if necessary, in response to significant or unforeseen developments</li> <li>7. Provide on-going budgetary information to relevant people</li> <li>8. Advise the Head and Governors if fraudulent activities are suspected or uncovered</li> <li>9. Identify additional finance required to fund the school's proposed activities</li> <li>10. Identify and implement any new software and improvements to systems</li> </ol> <p><b>Finance Responsibilities day to day</b></p> <ul style="list-style-type: none"> <li>• Annual school budget preparation and monitoring</li> <li>• Modelling of different staffing options or activity levels</li> <li>• Monitoring salary actuals against estimates and monitoring expenditure against the budget</li> <li>• Preparation and monitoring of budget forecasts</li> <li>• Preparation and monitoring of 3-year budget plans</li> <li>• Setting up and maintaining financial systems and other services</li> </ul>

	<ul style="list-style-type: none"> <li>• Preparation of financial policies and procedures</li> <li>• Pre-audit review</li> <li>• Preparation and completion of month-end and year-end procedures and returns</li> <li>• Balancing school accounts to the LA accounts</li> <li>• Attend governor’s meetings to present budgets, forecasts and general advice.</li> <li>• Validation and processing of income, expenditure</li> <li>• Completion of returns to the LA</li> <li>• Compliance with VAT regulations.</li> <li>• Monitoring and management of the school financial affairs to maintain a comfortable contingency and stable financial position throughout the year including the 3-year budget</li> <li>• Support and financial guidance to headteacher in making key staffing decisions</li> <li>• Payment of all invoices and investigating queries</li> <li>• Raising income invoices to generate income</li> <li>• Monitor SEN income and liase with the relevant SEN staff to ensure correct funding is paid and received in time</li> <li>• Advise and support the admin team to implement efficient and effective management processes including those linked to finance and HR</li> <li>• Recruitment and interviewing of finance and site staff if required</li> </ul> <p><b>Compliance</b></p> <ul style="list-style-type: none"> <li>• Manage the Federation’s compliance with statutory obligations, and advise others on the relevant legal, regulatory and ethical requirements.</li> <li>• Monitor and update the Federation’s risk register.</li> <li>• Responsible for the completion of statistical returns of information for the Education Department and the DFE, e.g. Census Returns and Workforce within the statutory deadlines.</li> <li>• To be responsible for obtaining appropriate licenses and insurance across the Federation.</li> </ul> <p><b>Administration</b></p> <ul style="list-style-type: none"> <li>• Keep records in accordance with the Federation’s record retention schedule and data protection law, ensuring information security and confidentiality at all times.</li> <li>• To be responsible for the Federation’s data protection, taking responsibility for monitoring data protection compliance and law, advising the school community on data protection issues.</li> </ul>
<b>General</b>	<ul style="list-style-type: none"> <li>• The Federation is committed to working together to safeguarding and promote the welfare of children and expects all staff to share in this commitment</li> <li>• The School Business Manager will be required to safeguard and promote the welfare of children and young people, and follow school policies and the staff code of conduct.</li> <li>• Please note that this list of duties is illustrative of the general nature and level of responsibility of the role. It is not a comprehensive list of all tasks that the school Business Manager will carry out. The post holder may be required to do other duties appropriate to the level of the role, as directed by the EHT.</li> </ul>

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## Person Specification

CRITERIA	QUALITIES
<b>Qualifications and training</b>	<ul style="list-style-type: none"> <li>• Relevant qualification - ideally in accountancy, business management, Finance or a related discipline</li> <li>• A school business management qualification e.g. level 4 diploma in school business management</li> <li>• Health and safety training</li> <li>• Data Protection training</li> <li>• Safeguarding training</li> </ul>
<b>Experience</b>	<ul style="list-style-type: none"> <li>• Line management experience (preferably in Finance)</li> <li>• Contributing to staff development</li> <li>• Working with children or young people</li> <li>• Finance – working in schools</li> </ul>
<b>Skills and knowledge</b>	<ul style="list-style-type: none"> <li>• Expert knowledge of financial management</li> <li>• Excellent attention to detail</li> <li>• Expert knowledge of Google Workspace, Microsoft Suite 365, Sims.net and Arbor Finance</li> <li>• Knowledge of School Finance.</li> <li>• Proficient in the use of payroll and budget planning packages</li> <li>• Understanding of financial procedures and legislation</li> <li>• Understanding of Data Protection and confidentiality</li> <li>• Effective communication and interpersonal skills</li> <li>• Ability to communicate a vision, lead and inspire others</li> <li>• Ability to build effective working relationships with staff and other stakeholders</li> </ul>

**Personal qualities**

- Commitment to promoting the ethos and values of the school and getting the best outcomes for all pupils
- Commitment to acting with integrity, honesty, loyalty and fairness to safeguard the assets, financial probity and reputation of the Federation
- Ability to work under pressure and prioritise effectively
- Commitment to maintaining confidentiality at all times
- Commitment to safeguarding and equality
- Embraces change
- Deals with difficult situations effectively