

Otley and Witnesham Partnership

Bursar Job Description

Otley and Witnesham Partnership are committed to safeguarding and promoting the welfare of children and young people and the successful candidate must ensure that the highest priority is given to following guidance and regulations to safeguard children and young people. The successful candidate will be required to undergo an Enhanced Disclosure from the Disclosure and Barring Service (DBS).

This job description sets out the key duties and responsibilities and the duties listed are examples for this grade of post, however, similar duties may still be undertaken by the post holder and are not excluded because they are not listed.

The post holder will need to have knowledge of relevant partnership policies and procedures and will be required to act on their own initiative, interpret information and situations and solve straightforward problems. Some one more senior is available for direction and guidance.

Key Duties and Responsibilities: Financial & Resource Management

- To lead the finance management and accountancy function.
- The preparation and presentation of annual budgets and three-year budgets taking into account the strategic priorities of the school(s).
- Ensure that budget preparation secures balanced budgets by evaluating data and in consultation with all stakeholders.
- Monitor, control and revise the budgets throughout the financial year.
- The provision of on-going budgetary information to budget holders/SLT and governors.
- Ensure the accurate and compliant oversight of the external payroll service.
- Work with leadership colleagues on the financial and support services elements of the School's Development Plans or other Improvement plans affecting the site.
- Ensure that compliant public sector financial agreements are in place with providers of services and that they are monitored.
- Oversight of the procurement of services and contracts for the school
- Ensure best value and value for money ancillary and support services for the school.
- Ensure financial procedures are managed commensurate with government, DfE and EFA guidelines and liaise with EFA for funding queries and support.
- Maximise income generation, from grants, fundraising, sponsorship, lettings, Extended Schools or other initiatives.
- Fulfil audit requirements.
- Develop and ensure the delivery of training/support for support team members, Middle and other senior leaders.
- Provide financial data as required for new initiatives.

Key Duties and Responsibilities: Personnel Management

- Undertake line and performance management of identified staff across the school.
- Complete returns to the LEA i.e. Teachers Pension return, sickness returns etc.

- Co-ordinate School Single Central Record in line with DFE and LEA guidelines.
- Manage personnel matters for all staff including support and advice.
- Oversee interviews and associated procedures (Advertising, DBS checks, Health Check etc)
- Contribute to non-teaching staff interviews by:
 - Preparing and planning new non-teaching support staff job applications; implement and review job descriptions, personal specifications and post advertisements.
 - Work as part of team to compile relevant interview questions and tasks
 - Work as part of the team to shortlist applicants
 - Arrange and attend interviews for non-teaching staff.
- Annually review induction procedures and update as required.
- Monitor staff absence and be involved in formal absence meetings.
- Liaise with payroll as required.
- Ensure all contracts are up to date and make amendments as necessary.
- Undertake the viability, planning and implementation of any change management projects under the guidance and direction of the Executive Headteacher.

Key Duties and Responsibilities: Administrative and Office Management

- Under the guidance of the Executive Headteacher and in collaboration with the Office Manager, design, maintain and review administrative systems to deliver the school's outcomes and goals.
- Ensure that the school systems and staff knowledge and practices are compliant with the requirements of the General Data Protection Regulations. Work flexibly with the LEA Compliance and DP Manager.
- Develop processes and systems that are best value for public finance.

Key Duties and Responsibilities: Premises, Health and Safety Management

- Together with the Executive Headteacher and Office Manager, carry out associated duties in line with Safety, Health and Wellbeing Management.
- Ensure availability of utilities, site services and equipment.
- Follow sound practices in estate management and grounds maintenance.
- Participate in Safety, Health and Wellbeing audits.

Key Duties and Responsibilities: General Management

- To support the SLT in the review and update of the School policies, including staff, student and parental surveys and services and actions responding to them.
- Oversee the management and efficient delivery of non-classroom support services on site such as reprographics and telephone systems. Ensure best value for such contracts by regular monitoring and review.
- Research and recommend effective and efficient solutions to improve the school's offer.
- Support whole school activities, processes and communications.

Other

- To keep up to date with national, public sector and LEA level developments in the areas of finance and operational matters impacting on education.
- In collaboration with the Executive Headteacher, to ensure effective time management and prioritisation within the office.
- To be a role model of professional school business management, to promote teamwork and to motivate staff to ensure effective working relations.
- Any other duties commensurate with the level and remit of this post.

- Please note that all elements of the job description and person specification relate to roles across the Federation and across Federation work is necessary.
- Ability and willingness to travel between the Otley and Winesham sites regularly (3.2 miles apart; approx 7 minute drive).

PERSON SPECIFICATION

Attribute	Essential	Desirable
Qualifications	• Education to NVQ Level 3 or comparable • Ideally hold or be working towards the Certificate in Business Management or the Diploma in Business Management (or be willing to work towards)	• Educated to NVQ4 or above in a business or administration or IT vocational qualification. • Health & Safety Qualification e.g. IOSH Knowledge of GDPR requirements. • Deputy Designated Safeguarding Lead.
Skills/Knowledge	• A skilled multi-tasking individual who can hold a number of tasks in operation at the same time and can securely switch between them as the need/contingencies of the day require. • The ability to apply alertness and concentration e.g. in the production of financial reports and forecasts. • The ability to work in an environment where there are likely to be interruptions (e.g. from other staff and pupils) • Skilled in the application of financial planning and budget planning/monitoring and forecasting requirements. This includes the planning of financial information over months/across year e.g. annual expenditure/budget/staff work programmes • Excellent communications skills both orally and in writing – and including numeracy skills for the production of reports with financial information and focus • Attention to detail and accuracy and a personal pride in the delivery of a first-class service. Knowledge of financial planning and budget setting principles and practices. • Presenting information (often of a complex nature) in a succinct manner which will assist the understanding of audiences who may not be specialists in the area (e.g. producing information for school governors) • Skilled in the ability to demonstrate initiative and independence in the setting of own work	• Skilled in the application of financial planning and budget planning/monitoring and forecasting requirements ideally in a school/academy environment. • Knowledge of the current national schemes and requirements in the financial reporting and budget setting requirements as they apply to schools. • Knowledge of financial planning and budget setting principles and practices particularly as they relate to the operation of Federated Primary Schools • Knowledge and understanding of the role of school governors in relation to the areas affected by of school business management activities • Direct application of knowledge gained concerning the setting and monitoring of staff performance targets and objectives

	priorities and scheduling – and that for the team of administrative and finance staff being managed. • Strong negotiating and influencing skills as required by the manager of a team of staff Ability to apply tact and diplomacy to diffuse conflict • Ability to advise teaching and support staff and governors of the value of policies and procedures in clear and plain language which wins their support and co-operation. • Skilled user of manual records and IT systems for the recording of confidential information, personal and personnel records and budgetary information • Skilled user of Microsoft packages to intermediate level or above (Word, Excel, and PowerPoint)	
Experience	• Using IT based systems for the financial and budgetary planning and forecasting of a service delivery area. • Holding direct personal responsibility for the monitoring of budgets – particularly those relating to office based services (e.g. reprographics, stationery, utilities). • Significant experience of working in personal contact situations with clients/customers and the delivery of a responsive front-line service to them. • Direct and extensive experience of the operational systems put in place to ensure document and information confidentiality. • Experience of working in one or more roles involving multi-tasking and the management of strict deadlines for both internal and external audiences. • Managing at least one other person in the delivery of their role • Previous use of general project management skills and research techniques in the production of reports or recommendations.	• Line and Performance management of a team of employees across discrete areas of responsibilities. • Awareness of Data Protection and Freedom of Information Act requirements as they relate to the education sector. • Previous application of coaching and mentoring skills and the carrying out of induction training for new members of staff. • Knowledge of OFSTED and EFA requirements as they impact upon the preparation and reporting work required in schools. • Acting as part of a management team in influencing decisions and policies as they apply to school business management.