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## Job Description

**Job Title: Bursar**

**Reports to:** **The Principal**

**Pension:** **LGPS**

**Job Purpose**

The bursar is a member of the senior leadership team and will work closely with the Principal. The national standards for bursars define the purpose of this post. They are:

* Financial Resource Management
* Administration management
* Planning and managing change
* Human resource management
* Health and safety management
* Facility and property management

**Specific Responsibilities:**

**Finance and Accounting**

1. Manage the school’s finances; including the whole school designated budget and other external funding in consultation with the Principal.
2. Undertake forward budget planning and setting including the preparation of annual forecasts and budgets, in consultation with the Principal.
3. To prepare the final accounts and liaise with the auditors.
4. Prepare financial reports as required by the Principal, the Governing Body, the Department for Education and other budget holders.
5. Attend meetings of the Governing Body, as required, to present reports on financial matters.
6. Monitor all income and expenditure relating to internal budgets; keeping budget holders informed of their balances and committed expenditure.
7. Be responsible for sales ledger, credit control and authorisation of purchase invoices.
8. Prepare reconciliation reports, VAT returns and any other financial return as required either statutorily or by other external authorities.
9. Be responsible for reconciliation and reimbursement of petty cash.
10. Advise the Principal and Governors on financial policy.
11. Support the Principal in the procurement of a range of services.

**Personnel and Human Resources**

1. Manage the school’s HR personnel systems.
2. Manage the schools single central record and be responsible for the management of all staff personnel records as they are appointed to Discovery School.
3. Manage all HR policies and procedures.
4. Manage the school’s payroll system.
5. Be responsible for the management of school support staff – administrative abd clerical.
6. Be responsible for the administration of the recruitment process for all new appointments.

**Building, Premises and Facilities**

1. Manage the school’s facilities and property management systems.
2. Manage the relationship and contracts with all external providers of goods and services including monitoring and regularly reviewing costing and contracts.
3. Have the overview of the schools health and safety and line manage the health and safety coordinator (senior technician’s role)
4. Be responsible for the management of security, heating, lighting and cleaning of the grounds and premises.
5. Co-ordinate with the facilities staff on all matters relating to health and safety, property, premises, maintenance and cleaning.
6. Manage maintenance requests for repairs, faults and failures.
7. Instruct and supervise third party contracts as necessary to ensure that all works are completed to a high standard.
8. To monitor and improve the overall site appearance and condition.
9. To ensure compliance with the schools Carbon Reduction Commitment.
10. Monitor and record energy and water usage and ensure that these are communicated effectively to the service providers to ensure that the costs incurred by the school for energy and water consumption are accurate and in line with any previous agreed contracts rates.

**Clerk to Board of Trustees**

1. Compiling Agendas for Board and all Committees.
2. Compiling Meeting Papers for Board and all Committees.
3. Taking Minutes at Board and all Committees.
4. Circulating Papers for Board and all Committees.
5. Updating and circulating Policies/Risk Registers/Balanced Scorecard across Board and all Committees.

**Whole School Administration**

1. Manage the school’s administration management systems.
2. Ensuring that all relevant staff have contracts of employment.
3. Take overall responsibility for compliance with data protection legislation.
4. Take overall responsibility for compliance with freedom of information act legislation.
5. Ensuring that the school has adequate insurance cover at all times to include employer’s liability, buildings and equipment cover, personal accident, travel insurance and other relevant cover.

**Further information:**

**General Roles and Characteristics of Leadership Team Members**

Strategic leaders with whole-school responsibilities will share the following responsibilities/characteristics:

1. Demonstrate a commitment to teamwork and collegiality.
2. Be involved in policy analysis, formulation, implementation, evaluation and review.
3. Be comfortable in a culture which expects them, and others, to have clear performance targets for self and school improvement.
4. Thrive in situations in which they, and other colleagues, learn and develop professionally.
5. Presenting the school in a positive light to parents, the community and other stakeholders in order to enhance its already positive image.
6. Undertake any other tasks and responsibilities appropriate to the level of this post.

**The following are standard responsibilities for all positions within Discovery School**

1. To maintain confidentiality at all times in respect of school-related matters and to prevent disclosure of confidential and sensitive information.
2. Participate in any Discovery School review/appraisal processes involving the identifying and meeting of training needs for self and others.
3. Take appropriate responsibility to ensure the health and safety of self and others.
4. Pursue the achievement and integration of equal opportunities throughout all Discovery School activities.
5. To undertake any other duties of a similar level and responsibility as may be required.
6. Discovery School is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults. We expect all staff to share this commitment.

**Person Specification**

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| --- | --- | --- | --- |
| **Category** | **Code** | **Criteria Description** | **Method of Assessment**  **(e.g. Interview**  **Application form, Tasks)** |
| **1. Skills & Abilities** | | | |
| **Essential** | **1.1** | Excellent organisational skills | Application/Interview |
| **Essential** | **1.2** | Excellent interpersonal and communication skills | Application/Interview |
| **Essential** | **1.3** | Ability to present information in a logical, clear and concise format and to communicate this effectively to colleagues, both verbally and in writing | Application/Interview/Task |
| **Essential** | **1.4** | Ability to work collaboratively with a range of colleagues | Application/Interview |
| **Essential** | **1.5** | Ability to work with autonomy within set boundaries | Application/Interview |
| **Essential** | **1.6** | Ability to manage own workload and supervise others | Application/Interview |
| **Essential** | **1.7** | Ability to understand and manage complex budgets | Application/Interview/Task |
| **2. Experience** | | | |
| **Essential** | **2.1** | 3 years’ experience of working in school finance, within the last 5 years | Application/Interview |
| **Essential** | **2.2** | Experience of leading and managing others | Application/Interview |
| **Essential** | **2.3** | Evidence of sound financial management and budget forecasting linked to strategic planning. | Application/Interview |
| **Essential** | **2.4** | Human resource management experience | Application/Interview |
| **Desirable** | **2.5** | Experience of premises management, health and safety, contract management and procurement. | Application/Interview |
| **Desirable** | **2.6** | Experience of business management | Application/Interview |
| **Desirable** | **2.7** | Experience of marketing | Application/Interview |
| **Desirable** | **2.8** | Experience of the Freedom of Information Act | Application/Interview |
| **Desirable** | **2.9** | Experience of being Clerk to Governors in a school. | Application/Interview |
| 1. **Knowledge** | | | |
| **Essential** | **3.1** | High level of IT skills with experience of MS Office and finance programs e.g. SAP/SIMS and FPS software or similar | Application/Interview |
| **Desirable** | **3.2** | Grant and bid applications | Application/Interview |
| **Essential** | **3.3** | Has a sound understanding and working knowledge of the Academies Financial Handbook – September 2013 | Application/Interview/Task |
| **Desirable** | **3.4** | School issues and wider local authority and national agendas. | Application/Interview |
| 1. **Qualifications, Education & Training** | | | |
| **Essential** | **4.1** | CIMA/ACCA/ACA/AAT full or part qualified or qualified by experience (more than five years) | Application/Interview |
| **Essential** | **4.2** | CSBM / DSBM qualification or qualified by experience (more than five years) | Application/Interview |
| **Essential** | **4.3** | Other relevant professional qualifications and experience that relate to the post | Application/Interview |
| **Essential** | **4.4** | Evidence of continued professional study | Application/Interview |
| **Desirable** | **4.5** | Degree level qualification or equivalent professional qualification | Application/Interview |
| 1. **Attitude/Disposition** | | | |
| **Essential** | **5.1** | Excellent interpersonal skills with ability to challenge while using tact and diplomacy and to manage conflict | Application/Interview |
| **Essential** | **5.2** | Ability to cope with change in a dynamic environment | Application/Interview |
| **Essential** | **5.3** | Creative and strategic thinker | Application/Interview |
| 1. **Other Requirements** | | | |
| **Essential** | **6.1** | Excellent attendance and timekeeping record | Application |
| **Essential** | **6.2** | A desire to learn and develop | Application |
| **Desirable** | **6.3** | Ability to drive and own access to own transport | Application/Interview |