

**CES DRAFTING NOTE**

**JOB DESCRIPTION/PERSON SPECIFICATION: BUSINESS MANAGER IN A CATHOLIC SCHOOL OR CATHOLIC ACADEMY TRUST COMPANY**

**Purpose**

The purpose of this drafting note is to assist governing bodies of Catholic schools and boards of directors of academy trust companies (hereinafter collectively referred to as the ‘governing board’), with the assistance and approval of their Diocesan Education Service, to draw up an appropriate job description for Business Manager posts. The job description can be used during the recruitment process, to inform applicants of the necessary qualifications, experience and skills required/desired, and also to complement the CES model Business Manager contract of employment on commencement of employment.

The CES has been unable to produce a model job description for Business Managers as there is no definitive set of qualifications, experiences, skills and/or duties applicable to the role; it will entirely depend on the particular local circumstances as to the type of person that is required to meet the needs of the specific role. Therefore, we have produced this note which incorporates many different qualifications, experiences, skills and duties that may be necessary or desirable and it is up to Catholic schools and academy trust companies (with their Diocesan Education Service) to determine what works best for them.

**Job Description/Person Specification**

It is useful to start the job description by setting out:

* Core purpose of the role e.g. the Business Manager is the leading support staff professional, working as part of the senior team to assist headteachers/principals to meet their duty to ensure that the school/academy trust company meets its educational aims, as well as providing, alongside teaching staff, professional leadership and management of support staff. The Business Manager will be expected to contribute to the achievement of the educational vision of the school/academy trust company; to develop high quality systems and services to support the school/academy trust company; and to promote the highest standards of business ethos.
* The Business Manager is a member of the school/academy’s/multi academy trust company’s senior leadership team
* Who the Business Manager is accountable to
* Who the Business Manager line manages, if appropriate
* Where the office base is
* Hours of work
* Salary and other benefits, including pension
* Expenses
* Annual leave entitlement
* [Probation period]
* Notice period
* Level of DBS check required

Qualifications

Please find below a list of qualifications that may be included in the job description for a Business Manager. You will need to specify which qualifications are mandatory/essential and which are simply desirable.

* Graduate status (specifying class and type if appropriate)
* Financial qualifications
* Other professional qualifications
* Any other relevant qualifications

Professional Experience

Please find below a list of professional experiences that may be included in the job description for a Business Manager. You may wish to specify which are essential/desirable and/or which are proven/are demonstrable/the applicant has some experience in.

* Experience as a Business Manager in an education setting
* Strategic leadership and management
* Leading school improvement
* Leading school-to-school support
* Expert knowledge in the field of education including knowledge of current education legislation and national education priorities, particularly in relation to Catholic education
* Knowledge of the inspection agenda
* Knowledge and experience of working within an academy trust company model
* Management experience [of a successful commercial organisation or significant educational establishment]
* Experience/knowledge in the following areas:
* Governance
* Scrutiny
* Organisational development
* Change management
* Risk management
* Health & safety
* Human resources
* Finance, including planning, budgeting, modelling and reporting
* Procurement
* Data and variance analysis
* Auditing
* P&R & Marketing
* Communications
* IT
* Fundraising and income generation
* Facilities management
* Delivery of best value for public funds
* Community development projects
* Experience of developing:
* Growth strategies
* Central team
* Growing capacity
* Financial strategy including generation of revenue
* Recording and using financial data and budget setting
* Developing business planning
* Managing people

Skills and Qualities

Please find below a list of skills and qualities that may be included in the job description for a Business Manager. You may wish to specify which are essential/desirable and/or which are proven/demonstrable.

* Effective communication skills
* Ability to manage time, multi-task and prioritise deadlines
* Interpersonal skills
* Empathy with children and stakeholder groups
* Stamina
* Strategic vision
* Resilience
* Integrity
* Flexibility
* Professionalism
* Outstanding team player
* Conflict management

List the duties/responsibilities of the Business Manager

When drawing up an appropriate job description/person specification it will be necessary to stipulate how and to whom the Business Manager will liaise and report so that job descriptions complement each other within the wider workforce.

Duties/responsibilities may be broken down into broader categories. Please find some broad headings with examples below:

* Preservation and development of the Catholic character of the school/academy trust company
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* Work in partnership with your Diocesan Education Service to ensure diocesan requirements are fulfilled/expectations are met
* Lead by example providing inspiration for pupils, staff, governors/directors and parents, demonstrating the governing body’s vision and values in everyday work in practice
* Leadership and Strategy
* Attend appropriate meetings of the governing board and any sub-committees thereof
* Plan and manage changes in accordance with the school development/strategic plan
* Lead and manage all support staff
* Maximise opportunities to expand scope and resources to enable higher standards and better resources for pupils
* Prioritise tasks to ensure effectiveness
* Communicate effectively e.g. influence, negotiate and engage with others, particularly the senior executive/leadership team/deal confidently with opposition/adopt an enthusiastic, motivational and inspiring management style/possess developed presentation skills/be a confident public speaker to a range of audiences
* Manage time effectively
* Adopt a flexible approach and possess the ability to adapt to change within the working environment
* Keep up to date on financial implications or impact of policy changes for the school/academy trust company
* Develop knowledge and networks to increase awareness of funding opportunities to support the objectives of the school/academy trust company
* Understand and measure impact and manage risk for each area of responsibility
* Financial Resource Management
* Ensure compliance with the Academies Financial Handbook
* Ensure compliance with the charitable objectives of the school/academy trust company
* Contribute to the school/academy trust company’s financial scheme of delegation
* Contribute to the school/academy trust company’s financial management handbook and review annually in line with ESFA guidance
* Evaluate information and consult with the senior executive/leadership team and governors/directors to prepare a realistic and balanced budget for school/academy activities
* Submit the proposed budget to the governing board [and senior executive/leadership team] [and headteacher/principals] for approval and assist the overall financial planning process
* Discuss, negotiate and agree the final budget
* Use the agreed budget to actively monitor and control performance to achieve value for money including using the collaborative buying group Churchmarketplace
* Undertake benchmarking analysis to provide evidence of value for money or action plan to highlight areas of potential savings compared to statistical neighbours
* Identify and inform the governing board of the causes of significant financial variance and take prompt corrective action as authorised
* Propose revisions to the budget if necessary, in response to significant or unforeseen developments
* Provide ongoing budgetary information to relevant people including the governing board, senior executive/leadership team and finance committee, as appropriate
* Coordinate the annual audit, liaising with all relevant personnel, agreeing the timing for audit visits and preparing all relevant documentation in advance
* Support the senior executive/leadership team in its functions relating to finance
* Ensure that the relevant financial policies are in place and reviewed in accordance with the requirements of the Academies Financial Handbook
* Promptly advise the governing board if fraudulent activities are suspected or uncovered
* Maintain a strategic financial plan that will indicate trends and requirements of the school development plan and will forecast future year budgets
* Identify additional finance required to fund the governing board’s proposed activities
* Seek and make use of specialist financial expertise, including through Churchmarketplace
* Maximise income through lettings and other activities subject to the governing board’s lettings policy which will be in accordance with diocesan/religious order trustees’ requirements
* Select types of investments which are appropriate taking account of risks, views of stakeholders, the Catholic character of the school/academy trust company and identify possible and suitable providers in order to maximise return
* Present timely and fully costed proposals, recommendations or bids
* Put formal finance agreements in place with suitable providers for agreed amounts, at agreed times and appropriate costs and repayment schedules
* Monitor the effectiveness and implementation of agreements entered into by the governing board
* Oversee the efficient management of the financial software system for the school/academy trust company and ensure segregation of duties in the financial processes
* Ensure all funding, both restricted and unrestricted, is received and accounted for correctly
* Administration Management
* Manage the school/academy trust company’s administrative function and lead all support staff
* Design and maintain administrative systems that deliver outcomes based on the governing board’s aims and objectives
* Establish and use effective methods to review and improve administrative systems
* Manage systems and link processes that interact across the school/academy trust company
* Use data analysis, evaluation and reporting systems to maximum effect by ensuring systems are streamlined to avoid duplication
* Define responsibilities, information and support for staff and other stakeholders
* Develop process measures that are affordable and that will enable value for money decisions for those managing resources
* Benchmark systems and information to assess trends and make appropriate recommendations to the governing board and other relevant parties
* Prepare information for publication and returns for the DfE, ESFA, local authority, Companies House, the Charity Commission, Ofsted and any other appropriate agencies and stakeholders
* Ensure that paper records meet data protection requirements and that the process for access and review is clearly defined in the data protection policy
* Obtain necessary licences and permissions for services within the school/academy
* Management Information Systems and ICT
* Consider approaches for existing use and future plans to introduce or discard technology in the school/academy trust company
* Consult with relevant people to introduce new technology or improve existing technology for various purposes
* Ensure that the asset register of all ICT equipment is kept up to date and that there is a defined depreciation policy for all capital assets of the academy trust company
* Ensure that the governing board has a strategy for using technology aligned to their overall vision and plans, ensuring value for money
* Communicate the strategy and relevant policies, including in relation to data protection, for use of technology across the school/academy trust company
* Establish systems to monitor and report on the performance of technology within the school/academy trust company
* Ensure resources, support and training are provided to enable staff 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
* Present/deliver data in a way that is user-friendly to a wide range of internal and external audiences, including the board
* Ensure that data collection systems providing information to stakeholders are streamlined to maximise efficiency of the data supplied, giving regard to publications on data management for teachers’ workload
* Human Resource Management
* Manage the payroll services for all staff including the management of pension schemes and associated services
* Monitor and maintain single central record data for all staff, volunteers (including directors and local governors), agency staff and visitors as appropriate
* Ensure the governing board’s equality policy is clearly communicated to all staff
* Ensure the governing board’s whistleblowing policy is clearly communicated to all staff
* Ensure that all recruitment, appraisal, staff development, grievance, disciplinary and redundancy policies and procedures comply with CES, legal and regulatory requirements and with the Bishops’ expectations as stipulated in the Bishops’ Memorandum on Appointment of Teachers in Catholic Schools
* Manage recruitment, performance management, appraisal and development for all support staff taking account of the Bishops’ Memorandum and any diocesan requirements
* Advertise support staff vacancies as required
* Monitor any relevant legal, regulatory, ethical and social requirements and the effect they have on the school/academy trust company and the staff
* Ensure people have a clear understanding of the governing board’s policies and procedures
* Monitor the way policies and procedures are actioned and provide support where necessary
* Ensure the safeguarding and security of all personnel records, both manual and electronic, in accordance with data protection requirements
* Seek and make use of specialist expertise in relation to HR issues, including through Churchmarketplace
* Evaluate the governing board’s strategic objectives and obtain information to assist the governing board in workforce planning
* Identify the types of skills, knowledge, understanding and experience required to undertake existing and future planned activities
* Ensure that all relevant staff, board members, governors and local governors have access to high-quality training and continued professional development opportunities
* Ensure that there is a clearly costed staff training and development plan linked to the school’s/academy trust company’s development plan
* Ensure that any new members of staff receive appropriate induction to their role, their team and the wider school/academy trust company
* Facilities and Property Management
* Ensure that the capital strategy policy of the Diocesan Education Service has been implemented by the governing board and that capital priorities for the year have been identified
* As part of the capital strategy policy, develop potential projects ready for submission in coordination with the Diocesan Education Service
* Ensure the supervision of relevant planning and construction processes is undertaken in line with contractual obligations and any diocesan/religious order trustees’ requirements
* Ensure the safe maintenance and security operation of all premises
* 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
* Follow sound practices in estate management and grounds maintenance
* Monitor, assess and review contractual obligations for outsourced services
* Ensure a safe and secure environment
* Ensure ancillary services e.g. catering, cleaning etc, are monitored and managed effectively
* Ensure measures are put in place to protect diocesan assets, including the land and buildings, and ensure that they remain under the control of the diocesan trustees at all times
* Manage the letting of school premises to external organisations, in accordance with diocesan/religious order trustees’ requirements, for the development of extended services and local community requirements
* Seek professional advice on insurance, in accordance with any diocesan requirements, and advise the senior executive/leadership team on appropriate insurances for the governing board and implement and manage such schemes accordingly
* Ensure all insurance policies provide adequate cover and obtain alternative quotes to ensure value for money as necessary
* Ensure capital funding opportunities are regularly reviewed
* Health & Safety
* Act as the governing board’s health & safety coordinator and fire officer
* Plan, instigate and maintain records of fire practices and alarm tests
* Ensure the governing board’s written health & safety policy statement is clearly communicated and available to everyone
* Ensure the health & 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 relevant parties on health & 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 executive/leadership team, directors/governors and, where appropriate, the Health & Safety Executive
* Ensure the maximum level of security consistent with the type and phase of the school/academy trust company
* Oversee statutory obligations are being met for pupils with special educational needs, ensuring that financial and supporting agency services are adequate for their diverse needs
* Ensure that the school/academy trust company is meeting all statutory and other requirements relating to safeguarding pupils
* PR & Marketing
* Actively promote the school/academy trust company by building excellent relationships with the local media to maximise opportunities to promote the school/academy trust company through submission of regular press releases to local media including local newspapers, magazines and radio
* Create and oversee a programme of events for the school/academy trust company to generate opportunities for pupils and generate positive publicity
* Produce a weekly newsletter
* Manage the school/academy trust company’s marketing plan and budget and monitor return on investment
* Manage the school/academy trust company’s website
* Accountability
* Provide information, objective advice and support to the governing board and senior executive/leadership team to enable the governing board to meet its responsibilities and to deliver its core functions effectively
* Reflect on feedback from others relating to your personal contribution to the company and take action as appropriate
* Other Duties
* To fulfil any other task reasonably requested by the Headteacher/Principal/Senior Executive Leader/governing board
* Seek out opportunities to develop your own skills and expertise to support your role as Business Manager
* Participate in training and implement newly acquired skills, knowledge and expertise to develop your role within the school/academy trust company
* Attend regular local events for Business Managers
* Liaise/network with other schools and Business Managers to develop best practice