

COUNCIL:CHESHIRE WEST AND CHESTER BOROUGH COUNCIL

JOB DESCRIPTION QUESTIONNAIRE

JOB TITLE	Business Manager & Clerk to the Governors) (Primary School)	JOB REF NO	AAAD7034
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BASIC JOB PURPOSE

Provision of business leadership, management ,strategic and administrative support, to ensure best value and the successful and effective operation of the school.

MAIN RESPONSIBILITIES

1	To be a member of the school's Leadership Group ensuring that decision making is part of a shared process in as much as members of the Leadership Group have a collective responsibility for the leadership and management of the school.
2	Manage the financial operations of the school, directly and through intermediate staff ; ensuring that financial data is available to the Head Teacher and Governors, including preparation of a detailed budget in accordance with LMS Regulations, preparing statements and financial records for annual audit, etc.
3	Assume overall management responsibility, directly and through intermediate staff, for the management of school premises; including maintenance, cleaning, refurbishment, health and safety, and security, etc.
4	Manage the work of Administrative and in- house catering staff, directly and through intermediate staff; in order to ensure that efficient administrative and catering systems are in place for the effective operation of the school.
5	Act as Clerk and provide support to the School Governors, providing a full administrative support service to the Governors' and Committee Meetings; including preparation of agendas and supporting papers, production and distribution minutes of meetings, etc.
6	In conjunction with the Headteacher manage the Personnel support systems within the school, including appointments (recruitment advertising, applications and interviews) and terminations; to ensure that all staff are correctly contracted and remunerated in accordance with school and Council policies and with employment legislation.
7	Manage the recording of staff absence information and provision of absence statistics to enable the Leadership Group to operate the school Absence Policy. To carry out absence interviews for Admin & Site Staff teams.
8	Manages any fundraising activities (sponsorships, external grants, match funding), in order to generate income for the school.
9	Negotiation, management and monitoring of contracts, tenders and agreements for the provision of support services for the school.
Notwithstanding the detail in this job description, in accordance with the School's/Council's Flexibility Policy the job holder will undertake such work as may be determined by the Headteacher/Governing Body from time to time, up to or at a level consistent with the Main Responsibilities of the job.	

1. RESPONSIBILITY FOR SUPERVISION/DIRECTION/COORDINATION OF EMPLOYEES

Staff proposed to be line managed by BM

	kitchen staff x 3		Site Maintenance Officer 1.0	Midday Supervisor 1
Administrative Assistant .75			School Cleaner (contract) 2	Midday Assistants x3

What does the supervision / management of these employees involve? (eg allocating work, training for the job, assessing performance – see guidance notes)

For all staff: Recruitment, informal disciplinary action, sickness management.

Delegation of work, target setting and appraisal of supervisory staff.

Other Employees supervised by jobholder (not in a direct line relationship): None

Does the job involve supervision, direction or management of people who are not employees? *Eg contractors, students on secondment*

No and FTE	Levels / grades	Types of work	Where based
	Building, maintenance, ICT and other contractors		Across school site

What does the supervision of these people involve?

Direct supervision of cleaners is delegated to Edsential. Job holder will direct tasks as necessary, especially in an emergency situation.

Supervision of contractors – Ensuring health and safety compliance, enforcing health and safety regulations where necessary.

Does the jobholder develop policy or provide advice and information which impacts on the supervision / direction / coordination of employees? Yes :

- Enforcing health and safety regulations with teaching staff.
- Ensuring annual risk assessments are carried out.
- Carrying out annual health and safety audit with health and safety team and advises Governors on health and safety issues
- Carries out training on safety issues (risk assessment, budget management).

1 RESPONSIBILITY FOR FINANCIAL RESOURCES

Financial responsibility	Value of the financial resource (p.a.)	How often is the duty performed?
School Budgets Has overall responsibility for schools financial management including budget, standards Funds and Devolved Capital. Relied upon to produce a realistic, workable budget for the effective operation of the school. Makes proposals about how costs can be reduced, and where appropriate, implements cost cutting exercises in area of responsibility. Advises Governors on best option, and the implications of each scenario. Submits and presents statutory report to Governors on progress of the budgets each term.	£1,300000	Annual budget setting process, takes about 3 months to set and agree.
Site budget Manages spending in these areas, any expenditure above £1k in these areas has to be approved by the job holder	Site budget (including Formula Capital) C£80	Weekly
Purchasing limit	Can sign off up to £10k without further authority	
Funding applications Proactively seeks funding from lottery or other sources for long term and specific projects.	£50k	

Does the jobholder develop policy or provide advice and information which impacts on financial resources? Yes :

If yes, give details

- Develops and maintains strategic financial management system of the school, to ensure up to date financial information is available, monitored and interpreted and appropriate recommendations are given to Governors.
- Responsible for development of business management and budget plans, advises Head Teacher and Governing Body on financial policy and planning.
- Ensures internal audit arrangements are developed and liaises with LEA and other external auditors.
- Has responsibility for the management of the schools accounting function, ensuring its efficient operation according to agreed procedures.

- Seeks advice on insurance and advises Governors on options, implementation and handling any claims.
- Oversees Team Leaders, ensures financial regulations complied with, initiates development of financial administrative systems and oversees their implementation.

2 RESPONSIBILITY FOR PHYSICAL RESOURCES

Physical resource	Nature of responsibility of jobholder	How often is the responsibility exercised?
Administrative systems for finance and personnel	Develops and agrees systems with team.	As and when required
Purchasing	Signs off all orders for IT hardware and software and for large and small site equipment	Weekly
Equipment	Responsible for safety of equipment – ensures all staff are health and safety trained. Overall management responsibility for procurement and maintenance of photocopiers and fax machines etc. Responsible for maintenance of the Asset Register.	Ongoing Ongoing
Building / grounds security	Continual review of security of the building, makes recommendations to improve security. Responsible for ensuring keyholders are aware of their responsibilities and that others know who they are. Safety and security of perimeter fences. Ensures building / grounds staff are approved before using.	Ongoing
Administrative procedures	Reviews and develops new admin procedures	ongoing

Does the jobholder develop policy or provide advice and information which impacts on physical resources? Yes :

- Negotiates, manages and monitors contracts, tenders and agreements for the provision of support services for best value for the school.
- Reviews policies on issues such as; health and safety, financial management, correct use of ICT and safe use of equipment.

- Has responsibility for buildings contract and project oversight, liaising with contractors, agencies and professionals.

3 RESPONSIBILITY FOR IMPACT ON PEOPLE

Task/Duty	Who benefits?	How they benefit?
Informing Governors : Provision of reports to Finance and Premises committees. Liaison re finance and site matters	Head Teacher, Governors, school staff, users of the building	Job holder is relied upon to provide financial information, and therefore enables head teacher to focus on core responsibilities. Governors have confidence in the information they are presented with, and rely upon this for decision making.
Personnel issues: Gives advice on general personnel matters eg maternity leave.	School staff and management	School staff are reassured that they will be dealt with fairly and given the information they need to benefit from employment rights. Managers are given the guidance they need to manage with confidence.
Leadership Group member: Any issues arising (curriculum, pastoral, operational) are discussed at this forum. Job holder is therefore involved in the wider issues in the school, including projects related to the curriculum Also required to attend some parents evenings and briefings as part of this role.	School staff, pupils, parents	Job holder is seen as an integral part of the school, not an additional function, the inclusion of the job holder in the full decision making process leads to better decisions for the school and a more holistic approach. Decisions and recommendations made by job holder are more likely to be well informed.
Liason with PTA and other local community groups	School and wider community	Access to school facilities for fundraising and leisure activities.

Does the Jobholder develop policy or provide advice and information which impacts on people? **YES**

- Supporting Governors and leadership group
- Advises school staff on the correct implementation of Council policies and procedures in areas such as employment, health and safety and risk management.

4 KNOWLEDGE

Type of knowledge	What knowledge is essential?	Why are these needed?	How is it normally acquired?
Specialist knowledge and qualifications	<p>High level of numeric literacy, ability to interpret and formulate data, make projections and recommendations and calculate the impact of changes in costs. Ability to research and analyse information.</p> <p>Protocols of conduct of Governors meetings</p>	<p>Relied upon to produce a workable budget and present Governors with realistic options. To be able to estimate and calculate effect of changes in National Insurance levels, pay increases for budget setting. Use of formula to calculate allocation of budget to each section head. Proactively seeks funding for the school</p> <p>Clerking of Governors meetings.</p>	<p>Degree or equivalent in school Business management / administration and CIPFA / CIMA qualification</p> <p>Training and experience.</p>
IT packages and systems	<p>Operation of networked and stand-alone PCs - local databases for school roll; administration (Schools Information Management System – ARBOR); finance (Financial Management System – FMS Unit 4), MS Office suite.</p>	Essential tools for performing the job	Internal and on the job training
Personnel policies and procedures	<p>Teachers Terms and Conditions NJC Terms and Conditions, CCC policies and external legislation relating to employment.</p> <p>Teachers and local government pension schemes</p>	<p>Required to advise head teacher and others. Advice must be based on good factual knowledge and is required to be accurate and up to date. Has to build costs of pensions into the budget.</p>	On the job training, staff handbooks and policies.

Financial	Internal CWAC and DFES guidelines. Capital expenditure regulations, Best Practice (CIPFA) guidance for financial management, VAT regulations Funding regulations	For accurate budgeting and reclaiming of VAT where appropriate. How and where funding can legally be obtained from	Formal qualifications and on the job training in internal processes
Management	Theories and practice of managing a team of staff, motivation theories, dealing with change.	Management of a diverse team of staff includes admin and technical staff. Dealing with reduction of staff or hours in other areas of the school	Formal and informal training, on the job experience.
Health and Safety	Working knowledge of main Health & Safety issues affecting the operation of the school.	To ensure that the school operates within Health & Safety regulations	Formal and informal training, on the job experience.

How long would it take for a jobholder to become fully operational?

A CPD plan over two years would be envisaged to support this role.

5 MENTAL SKILLS

a) What sort of situations/problems does the jobholder typically have to deal with?

Example:

Managing school budgets and balancing competing demands for financial resources to ensure that sufficient funds are allocated to meet teaching/curriculum needs.

Example:

Resolving disputes/conflicts between individual Support Staff members.

Example: Liasing with senior staff and others whose service expectations cannot be fully achieved due to a shortage of resources.

b) Give an example of the most difficult or demanding situation/problem the jobholder has to solve.

Example:

Budget setting

The job holder must adjust the budget to meet the needs of the school, and where there is a deficit, make recommendations about the way the budget can be balanced, by making reductions to (for example) overtime, capitation to departments and training. The job holder has to investigate ways in which money can be saved, and research ways of gaining additional income for the school in the form of additional funding, and present findings to Governors and staff.

c) Approximately how often would the example in (b) occur?

Annually – lasts about 3 months
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Give details below of the mental skills required in the job and reasons why they are needed.

Mental Skill	Why Needed?
Strategic	Job holder is involved in the development of financial strategy for the school and budget setting.
Analysis	Analysis of budgetary information Interpretation of information for funding bids.
Judgement	On long term issues; budgets, spending, use of contractors, timing and organisation of building works.
Fact finding / research	Researches funding available to the school, gathers information for the bid,
Creativity	Devising / Setting agendas for Governors Committee Meetings.
Problem solving	Integral part of the job, problems range from those needing immediate attention and response from job holder (building related or staffing emergency situation) to those requiring a more considered decision (balancing the budget whilst maintaining the quality of education provided by the school)
Planning	When modelling projections in budget setting process, has to take into account predicted, but unknown staffing changes, eg likely pay increases, national insurance changes, likely retirements, maternity leave and cover. Will look at previous years expenditure in order to consider where changes or savings can be made. Considers and advises on the impact of other business decisions upon factors such as the budget / staffing levels

6 INTERPERSONAL AND COMMUNICATION SKILLS ESSENTIAL FOR THE JOB

Skill	Used for?	With whom?
Leadership	Effective staff management	Own team and others with whom the job holder interacts
Listening / empathy	Important when dealing with delicate personnel matters. Diffusing heated / emotional situations	Leadership team, teachers and other school staff
Oral / Written skills	Producing financial, Taking /writing minutes of meetings etc	Governors, teaching and support staff
Tact/Diplomacy	Responding to enquiries, demands, etc for information, support and advice.	Governors, teaching and support staff, parents and students.
Presentation skills	Parents AGM, Governors meeting, staff and teacher training and briefing sessions	Parents, Governors, Staff, teachers
Negotiation	Obtaining best price, best value. Talking about appropriate use of the site Discussing spending or excessive spending on the budget	Contractors, suppliers Neighbours Heads of Department
Interpersonal - ability to communicate effectively with all members of the school community.	Important part of the role to get things done. All staff have to be confident that the job holder is an effective ambassador of the school.	Staff, leadership group, Governors, pupils

7 PHYSICAL SKILLS ESSENTIAL FOR THE JOB

Physical skill	Used for?	Any precision/speed requirements?
Hand eye coordination	Keyboard. Integral to the job	

8 INITIATIVE AND INDEPENDENCE

Allocation of work

a) How is work allocated to the jobholder?

Some preplanned work, eg budget setting, some adhoc work from the head or from urgent matters arising. Work is mainly dictated by the school plan.

b) What is a typical cycle for allocating work to the jobholder eg hourly, daily, weekly?

Annual cycle for budgets and different annual cycle for school academic year

Scope for initiative

c) How much freedom/discretion does the jobholder have:

to change the way work is done?

(e.g. recommending changes in policy, procedures, resources)

Job holder works autonomously and is encouraged to develop and initiate change in own and in others working practices. As a member of the leadership team of the school, is expected to initiate and implement changes in response to changes in the economic or academic environment.

to allocate their time to duties?

Manages own diary

d) What is the level of guidance/instruction available?

DFES guidance, Financial regulations, personnel management information on the intranet, Green book, LEA website.

e) What sort of direction, management or supervision is given to the jobholder?

Line manager is based in the same building and is available for formal and informal contact meetings.

f) Give three examples of problems or decisions the jobholder would be expected to deal with themselves without reference to a supervisor/manager. How often do these occur?

Expected problem	Nature of available guidance	Typical Frequency
Overspend on budget by a faculty head- job holder will discuss this with them, and reach an agreement about whether or not they can go over budget	Uses own judgement of the circumstances to decide what is appropriate.	Occasional

Purchasing decisions where there is unexpected expense, for example, where IT hardware needs replacing. Job holder would purchase and adjust budget headings accordingly.	Experience	Occasional
Unexpected problem	Nature of available guidance	Typical Frequency
Resolving queries and errors in salary payments to teaching and support staff, made by Council Payroll Services.	Council policies; Job Holder's experience	Monthly

g) Give two examples of problems or decisions the jobholder would be expected to refer to their supervisor/manager. How often do these occur?

Problem or decision	Point of referral	Typical Frequency
Formal disciplinary issues -	Job holder will take informal action, but at the point that formal action needs to be taken, the head teacher will be involved.	Once or twice a year
Budget setting	Job holder presents budget models to Governors and Head Teacher, with recommendations. Final decision about implementation rests with Head Teacher and Governors	Annually

9 PHYSICAL DEMANDS

Physical Demand	Typical Duration	How often?	Other details (eg how heavy?)
Walking – a large amount of the job holders time is spent walking around the site to carry out responsibilities and also to talk to colleagues and discuss work related matters.	Up to 1 hour	daily	
Sitting at keyboard / desk	Up to 2 hours per occasion	daily	

10 MENTAL DEMANDS OF THE JOB

Nature of task	Mental Demand	Duration	Frequency
Budget setting	Concentrated work with some interruptions	Several hours at a time	Daily for about 3 months
Meetings	Listen, analyse information, consider how to progress issues	Couple of hours	monthly
Taking minutes at Governors' meetings	Concentrated listening and attention – ensuring details of discussions are recorded accurately.	Several hours	Half termly
Preparing financial budgets, statements, reports, etc Writing up minutes of Governors' meetings	Concentration – ensuring accuracy, attention to detail.	Up to several hours per occasion	Ongoing

To what extent is the job subject to work-related pressures e.g. regular deadlines, frequent interruptions, conflicting demands?

Nature of pressures /interruptions	Source	For how long?	How often?
Interruptions	Telephone calls from suppliers, parents, etc Requests for information and advice – from teaching and support staff	Few minutes	Regularly
Conflicting demands	<ul style="list-style-type: none"> Teaching staff demanding immediate priority/attention to supporting their curriculum needs – either by Job Holder or by member of support staff 		<ul style="list-style-type: none"> Regularly
Deadlines	<ul style="list-style-type: none"> Preparing/setting budgets and financial statements Reconciling accounts Governors' meetings Issuing HR documentation Government and LEA returns 		Annually Monthly Termly as reqd Annually/Monthly

If the jobholder is subject to any other form of mental demand, please give details below.

Has to maintain an awareness of all current issues within the school, for example, student numbers, ICT plans, student profile (courses being studied), and use this information for planning or any other activity.

12 EMOTIONAL DEMANDS

Nature of the task being performed by jobholder.	Behaviour/source of the emotional demand	Frequency (per day/wk/month)
Responding to enquiries and needs of visitors and callers	<ul style="list-style-type: none"> Parents, who can be angry, aggressive/abusive, etc Students, who can be abusive 	Regularly
Resolving disputes/grievances	Support staff, who may be upset, angry, etc	Occasionally

13 WORKING CONDITIONS

- a) In what kind of places does the jobholder normally work (eg office, library, gardens, clients' homes)?

If more than one, give approximate proportion of time in each.

Location of work	Proportion of time
School office and site	95%
Off site meetings	5%

- b) If the jobholder works outside, are they expected to work regardless of the weather or are alternative arrangements made eg work on other duties?

- c) What unpleasant environmental working conditions or behaviour from other people are met in performing the job? (See guidance notes for examples)

Working Condition or Behaviour from other people	How long does it last at any one time?	How often does it typically occur?
Parents ringing up to complain can be unpleasant and rude.	Few minutes	Occasional

- d) What protection is offered (if any) e.g. against adverse weather (clothing, shelter), against infection, security measures etc.

Not Applicable

OTHER CONSIDERATIONS

If you feel that there are other, special considerations which might affect the evaluation of this job, please give details.

Nature of the role and the commitment of the leadership team, means that work often goes beyond the working day and into the weekend.