



Stormont School

## Stormont School

### JOB DESCRIPTION - BURSAR

#### Post:

Bursar and Clerk to the Governors

#### Responsible to:

Headteacher and Chairman of Governors

#### Responsible for:

All Staff (in conjunction with the Headteacher) and specifically responsible for Administration Staff, Catering Staff, Caretaking Staff, Cleaning Staff,

#### Liaison with:

Senior Leadership Team, School Office Staff, School Specialist Support, School Surveyor, Suppliers, Parents' Association representatives, Contractors, Teaching Staff, all Governors and committees (as required).

#### Salary & Benefits:

Commensurate with skills and experience, a competitive salary will be offered based on Stormont School's salary scale and contributions will be made to a pension scheme. There will be 30 days' holiday entitlement (excluding public holidays), part of which can be taken during term time with the agreement of the Head.

#### Hours of Work:

This is a full time post (including school holidays). The role is a senior management position and although the core working hours are 08:00 – 17:00, the Bursar is expected to work the hours required to fulfil the duties of the post over and above the normal working week, which, for the avoidance of doubt, may include evenings and weekends.

#### Purpose

To provide operational management for the finances, property, compliance and aspects of the administration of the School. The post-holders report directly to the Head who has overall responsibility for the School's strategic direction.

The Bursar is responsible to the Head for the efficient and effective running of the following:

- Finance
- Buildings and Grounds Maintenance and Servicing of Equipment
- Health and Safety
- Human Resources
- General Administrative and IT Systems
- Catering and Cleaning Services

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**Key responsibilities / accountabilities**

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**Finance:**

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**Management Accounts**

- Prepare the annual budget, to include the preparation of estimates for the profit and loss account, balance sheet and cash flow, together with all department budgets
- In close liaison with the Head, prepare regular updated cash flow and profit & loss projections, with appropriate variance analysis, for presentation to the Head
- In close liaison with the Head and Governors, prepare the setting of School fees
- Ensure routine expenditure control
- Capital project plans where required
- Identification of cost efficiencies
- Monitor income and expenditure in relation to budget and presenting regular management reports (including cash flow projections) to the Head

**Financial Accounts**

- Advise on general financial policy within the School
- Complete bank and cash account reconciliations
- Agree investment policy with the Head and manage the investment of surplus funds in accordance with this policy. Provide regular reports on investment performance
- Perform all other ledger reconciliations as required, including sales and purchases
- Preparation and collection of School fees, including deposits
- Ensure tight credit control, following up slow payers
- Manage scholarship and bursary funds
- Manage all aspects of procurement, ordering, purchasing and payment of goods and services to the School
- Ensure the accounts of the School are prepared in accordance with statutory and regulatory requirements. Liaise with the auditors in relation to preparation, completion and filing of these accounts
- Manage and maintain accounts for income from other sources (including rental income)
- Prepare financial appraisals of particular projects
- In liaison with professional advisers, advise on taxation matters generally, including income tax, rating assessments and VAT

**Payroll**

- Payment of all salaries and wages, including PAYE, Superannuation and National Insurance Contributions
- Ensure compliance with regulations for benefits in kind
- Administer pension schemes for staff
- Administer the School's health care scheme.

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**Building and Grounds Maintenance and Servicing of Equipment**

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- Through the caretakers, ensure routine maintenance of all School buildings. Prepare programmed maintenance schedules in line with the available budget and keeping of records
  - Ensure installation and maintenance of equipment for the detection, warning, protection and escape from fire. Ensure the necessary fire risk assessments are carried out, and full compliance with regulations, including maintenance of extinguishers and alarms
  - The maintenance and efficiency of the installations and plant for electric and gas supply, heating, domestic hot water, water softening etc. Letting of energy supply contracts at competitive rates
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- Ensure that catering areas meet the requirements for hygiene and food safety
  - The maintenance of the lighting and ventilation in all School buildings
  - Manage cleaners and ensure high levels of cleanliness are maintained at all times
  - Manage and maintain hiring of facilities.
  - In conjunction with the School's surveyor and the Buildings Committee, co-ordinate the planning of building development projects
  - Ensure fire safety equipment, emergency lighting and alarms are tested to agreed schedules.
  - Maintain Fire Risk Assessment and Fire Safety Policy
  - Ensure purchasing, servicing and maintenance of all services and equipment adhere to current regulations.

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### **Health and Safety**

- Ensure the School complies with current Health and Safety regulations in all areas of operation
- Maintain and review the School's Health & Safety Policy
- Chair the Health & Safety Committee
- Provide Health & Safety induction training for new staff and refresher training for staff, as necessary
- Act as the School's Fire Officer, holding regular fire drills
- Report on Health & Safety matters each term to the Board of Governors' meeting

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### **Human Resources**

Working with the Head and any external HR support requirements to:

- Ensure that the School complies fully with Safer Recruitment procedures
- Ensure compliance with all relevant aspects of employment law including employment protection, equal pay, minimum and living wage, Working Time Directive or discrimination
- Ensure that the School has appropriate disciplinary and grievance procedures, and other relevant policies
- Play a full part in the recruitment of teaching and non-teaching staff, with a particular focus on salary and terms and conditions of employment
- Manage the employment, terms and conditions of service, supervision and welfare of all non-teaching staff, including conducting the appraisal process
- Ensure staff training records are maintained and courses booked when required
- Ensure staff sickness records are maintained and manage the School's sick pay schemes
- Take legal advice on HR matters when requested
- In conjunction with the Head, ensure that all relevant staff have contracts of employment and keep the School's standard contracts up to date as new legislation takes effect
- Work with the Data Protection Team to ensure compliance with applicable regulations
- Take professional advice on behalf of the School in all these areas as required.

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### **General Administrative and I.T. Systems**

- Maintain contact with statutory authorities and other regulatory and relevant professional bodies, attending training courses as appropriate
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- Engage with the ISBA (Independent Schools' Bursars Association) and attend their Annual Conference, together with membership of other professional bodies as appropriate
- As a member of the Senior Leadership Team:
  - contribute to the day to day leadership of the School
  - contribute to the strategic leadership of the School
  - develop, with the Senior Leadership Team, an annual School Development Plan to deliver the strategic aims of the School
- Contribute to the strategic and management leadership of IT and communication systems within the School
- Support and manage the IT Network Manager to:
  - maintain the IT infrastructure
  - provide support for software and operating system difficulties
  - manage the architecture of the website
  - advise on current and future needs to deliver the IT strategy
  - maintain the IT security systems and back up of data

### **Catering and Cleaning Services**

The Catering and Cleaning Services are "in house". The Catering Manager, Cleaning Supervisor and Caretakers report to the Bursar.

- Through the caretaker, ensure routine maintenance of all school buildings. Prepare programmed maintenance schedules in line with the available budget and keeping of records, liaising with contractors where necessary
- Liaising and supporting both the Catering Manager and Cleaning Supervisor and their teams
- Ensure that catering areas meet the requirements for hygiene and food safety
- Manage cleaners and ensure high levels of cleanliness are maintained at all times

### **As Company Secretary and Clerk to the Governors, the Bursar is responsible to the Board of Governors for:-**

- Attending all meetings of the Board of Governors and sub-committees which include, Finance, Buildings, Health & Safety, P.R and Marketing, Risk
- Preparing agendas, circulating papers and keeping minutes of all main Board and sub-committee meetings
- Co-ordinating with members to ensure agreed actions are followed through
- Providing information and advice to Governors
- Procuring legal, taxation and other advice as required
- Dealing with procedure, membership, election and re-election of directors and holding of AGM in line with the memorandum and articles of association and Company Law
- Completion and submission of statutory returns to Companies House and the Charities Commission
- Ensuring all statutory requirements are adhered to Liaising with the School's insurance brokers regarding all aspects of insurance cover

The above duties are neither exclusive nor exhaustive and the post holder may be required by the Senior Management Team to carry out appropriate duties within the context of the job.

## Stormont School

### PERSON SPECIFICATION

#### POST TITLE: Bursar

	Essential	Desirable	Assessed by
<b>Education/training/qualifications</b>			
Evidence of academic achievement to at least NVQ Level 3/ A level standard or equivalent and a very good command of written and spoken English	Y		App/Doc
Association of Accounting Technician (AAT) or similar qualification/training (minimum)	Y		App/Doc
Diploma of School Business Management (DSBM) or similar post-graduate/leadership qualification		Y	App/Doc
<b>Experience</b>			
Managing strategic financial plans	Y		App/Int, Ref
Managing budgets, financial reporting, procurement and fixed assets	Y		App/Int, Ref
Managing change projects	Y		App/Int, Ref
Managing teams	Y		Int/Ex
Managing HR and payroll	Y		App/Int, Ref
Experience of managing within an educational environment		Y	App/Int, Ref
Significant experience in managing at a Senior Leadership/Management Team level	Y		App/Int, Ref
<b>Knowledge, skills and ability</b>			
Ability to handle financial data accurately, interpret and present information	Y		Ex, Int
Ability to conduct staff appraisals and identify support and training	Y		App, Int
Able to deliver services and systems applicable for effective school management	Y		App/Int, Ref
Knowledge of Sage Accounts software and spreadsheets	Y		Ex, Ref
Knowledge of payroll and pensions	Y		Int
Able to deliver value for money initiatives	Y		Int
Able to understand national and regional education services and deliver appropriate strategies	Y		Int
Able to lead teams and individuals	Y		Int
Able to strategically influence decision making within the school	Y		App/Int
High level IT skills including Word, Excel, and with the ability to train and develop others	Y		Ex, Int
Knowledge of MS Teams		Y	App, Int
Knowledge and thorough understanding of the Data Protection legislation, freedom of information and confidentiality issues	Y		App, Int
Understanding of educational enterprise issues		Y	Int

	Essential	Desirable	Assessed by
Understanding of promoting positive relationships within the wider school community		Y	Int
<b>Additional Skills</b>			
Ability to communicate effectively, negotiate and network through highly developed and accurate interpersonal, written, oral and presentation skills	Y		Int
Ability to lead, motivate and enthuse individuals and teams within a changing environment	Y		Int
Ability in evaluating and achieving service quality and in setting/achieving strategic objectives through performance management	Y		Int/Ex
Ability to drive forward change in challenging circumstances	Y		App/Int
Well-developed analytical, planning and excellent organisational skills	Y		Int/Ex
Ability to prioritise work and to meet and manage work to tight deadlines	Y		Int
Resilient and determined but can also provide support, demonstrate empathy and deal with staff in a sensitive and considerate manner	Y		Int/Ex
<b>Other characteristics</b>			
Demonstrable sympathy with the vision and values of Stormont	Y		App/Int
Capacity to work with others both within and outside of the school, maintaining enthusiasm and a calm level of professionalism at all times	Y		App/Int
Ability to support the vision for high quality education which promotes spiritual, moral, social and cultural development		Y	App/Int
Enthusiasm and willingness to go 'above and beyond' by contributing and participating in the wide range of extra-curricular activities on offer	Y		App/Int
Committed to inclusion and diversity to ensure the maximum benefits for pupils and equality in employment and service delivery matters	Y		Int
Committed to personal development for all staff including themselves	Y		Int
Committed to abide by and promote equality and diversity, health and safety and safeguarding and child protection	Y		Int/Ref
Committed to safeguarding and promoting the welfare of children and staff	Y		Int/Ref

App	Application
Int	Interview
Ex	Exercise or activity
Ref	References
Doc	Documentary evidence