**APPOINTMENT OF BURSAR**

**JOB DESCRIPTION**

St Aubyn’s School is a happy and successful independent day school for children aged 3 to 13, employing approximately 100 staff, some of whom are part-time. The School is pleasantly situated close to Epping Forest, 1600m from South Woodford Station. St Aubyn’s School is committed to safeguarding and promoting the wellbeing of children. The Bursar is expected to be committed to his/her responsibilities and requirements for safeguarding children. The Bursar is appointed by the Board of Governors and reports to the Head. He/she acts as Clerk to the Governors/Company Secretary and serves on various Governor Committees, overseeing the provision of agendas, papers and minutes as appropriate. The Bursar supports the Head and Governors in the leadership of all non-teaching aspects of the School, in order that the Head, through the teaching staff, can deliver the curriculum and wide range of extra-curricular activities to the highest possible standards. The Chair of Governors, Finance Governor, Head of Maintenance, Catering Manager and HR Manager support the Bursar in the fulfilment of his/her responsibilities. The Bursar also provides advice to the Head to enable the School to flourish and supports the Board of Governors to allow them to meet their responsibilities as Governors and Trustees.

The list of duties and responsibilities is neither exclusive nor ever necessarily complete. The Bursar’s main areas of responsibility encompass the following areas:

- Strategic

- Financial

- Premises

- Compliance, Risk Management, Health and Safety

- Human Resources

- Clerk to the Governors

- School Representation

The primary duties are as follows:

**Strategic**

The Bursar, as Clerk to the Board of Governors, is ultimately responsible to the Chair of Governors as his/her line manager. As a member of SMT, the Bursar is directed by the Head in relation to the everyday working of the School. The Bursar is expected to contribute to the School’s strategic development and to assist the process and the provision of relevant information, trends and analysis.

**Financial**

In conjunction with the Chair of Governors and Head and under the direction of the Finance Committee, the Bursar will:

- Maintain the School accounts in line with recognised accounting

practices and other legal requirements in accordance with the Statement of Recommended Practice (SORP).

- Provide regular finance reports to the Governors, including Statements of Financial Activity (SOFA) and balance sheets in line with the Charity Commission.

- Prepare Statutory Accounts and subsequent liaison with the

School Auditors.

- Advise on general financial policy, prepare appraisals for particular

projects and the preparation of a long-term financial strategy for the

future development of the School.

- Prepare monthly management accounts, cash flow forecast and other documentation as required by the Finance Committee.

- Prepare annual estimates of income and expenditure as required by the Board of Governors, and updates of 5-year plan future projections.

- Obtain the agreement of budgets and monitor accounts against

budgets, both at departmental and whole school level.

- Prepare any other papers requested by the Governors to inform their decisions on matters such as the annual fee increases.

- Report immediately any unique variances and prepare regular accounts for budget holders.

- Use benchmarking tools to identify areas of relative spending, assess trends and prepare and submit Annual Census information to ISC, DfE and other organisations providing benchmark data.

- Be responsible for the management of the School accounting function and for the drafting and monitoring of all accounting procedures.

- Manage the payroll for School staff, including overseeing separate pension schemes for Teaching and Non-Teaching staff and submit monthly/annual returns to HMRC and the relevant pension authorities.

- Liaise with the School’s bankers regarding deposits, overdraft facilities, servicing of any loans (the School currently has no loans), collection of fees, payment of suppliers and control of day-to-day banking.

- Oversee the processing of fee accounts for parents each term,

prepare pupil fees and ensure collection of all fees and extras. Monitor the operation of schemes to enable monthly payment of fees. Oversee the

process for managing the late payment of fees and debtors.

- Administer the assisted places/bursary system for prospective parents

needing financial assistance and assess the applications.

- Supervise the contract catering and cleaning budgets and operation in conjunction with the onsite Managers.

- Supervise the School’s Insurance in all its forms and deal with

insurance claims. Liaise with the School’s insurance brokers to ensure

adequate insurance cover (general, vehicular, personal accident, fees

protection) for the School and its pupils, including indemnity insurance

and insurance cover for special events.

- Manage the letting of School premises, facilities and minibuses to outside

organisations, the drafting of letting agreements and the collection of

fees, bearing in mind the need to exercise charitable gestures.

- Ensure the School complies with all of the reporting requirements of the

Charity Commission and that there is full compliance with the demands

placed on independent preparatory schools. Prepare statutory returns to Companies House and the Charity Commission.

- Prepare the School’s business plan with the Head.

- Advise on financial policy and put into practice the agreed policy and procedures.

- Manage all insurance-related matters.

- Monitor and report income and expenditure.

- Ensure financial management of capital and maintenance projects that

have been endorsed by the Governors.

- Pursue any debts.

- Ensure compliance with all VAT regulations.

**Premises**

In conjunction with his/her team, the Bursar has a primary responsibility to present the premises and services in their best state at all times.

- Strategic overview of the maintenance and refurbishment of School

buildings, security, fire prevention, heating and lighting.

- Oversee the management of maintenance schedules and the efficient

operation of all estate facilities.

- Letting of School premises and residential flats.

- Oversee the upkeep of the playing field, gardens, boundaries, astroturf,

fencing, roads, paths, trees and woodland.

- Oversee the purchase, repair and maintenance of all minibuses, plant

and equipment, furniture and fittings.

- Liaise with architects, Development Governor and local planning

concerning building improvements and capital projects. Oversee

building projects, acting as first point of contact.

- Negotiate, manage and monitor contracts, tenders and agreements for

the provision of support services such as energy supply, telephone

communications, insurance, and capital construction or maintenance

projects and the regular monitoring and review of such projects to ensure

control and, where possible, savings on expenditure.

- Responsibility for the School minibuses and drivers.

- Advise the Head and take appropriate security measures both for

premises and for staff and pupils.

**Compliance, Risk Management, Health and Safety**

- Ensure that the School is compliant with both Health and Safety

Executive and Independent Schools Standards Regulations (ISSRs).

- Act as the School’s named Compliance Officer and Health and Safety

Officer, organising staff training as required.

- Demonstrate an executive role in maintaining the School’s Health and Safety policies to comply with the requirements of the Health and Safety at Work Act and other legislation, including risk assessment/management and hazard identification.

- Oversee the School administration and database systems.

- Be responsible, in conjunction with the IT Manager, for the School’s ICT, obtaining the necessary ICT licences and permissions, ensuring their relevance and timeliness.

- Oversee procedures to ensure the wellbeing of staff, pupils and

visitors, and compliance with Health and Safety legislation both on the

School premises and, in consultation with the Headmaster, for School

trips and outings.

- Be aware of the importance of a disaster recovery plan and its place

within the management procedures of the school.

- Keep abreast of current Health and Safety and Disability Access

legislation (Accessability Plan) and ensure compliance in all areas.

- Oversee the School’s compliance with ISI’s regulatory requirements,

and, in conjunction with the Head and the Deputies, lead the School through any future inspections, including Safe Recruitment procedures and maintenance of Central Register.

- Lead the School staff Health and Safety Committee, and participate in

the Governors’ Compliance and Health and Safety Committee.

- Act as Fire Officer and be responsible for the installation and

maintenance of equipment for protection against, detection of, and

escape from fire. Keep records of and initiate regular fire practices

and alarm tests. Ensure emergency procedures are current and

timely.

- Be responsible for the security of the School site, with the delegation

for locking to maintenance.

- Act as the School’s Data Protection Officer, be responsible for data

protection (GDPR) and oversee the management of School systems and

data.

- Analyse risk and maintain the risk register.

**Human Resources**

- The Bursar is the most senior member of the non-teaching staff.

He/she is involved in the appointment, terms and conditions of

service and appraisal of members of the non-teaching staff at the

School.

- Oversee the management of the School’s Staff Handbook and other key documentation, to ensure the effective operation of the School, ensure compliance with regulations and support HR management.

- Ensure compliance with all aspects of employment law and inform the HR Manager.

- Line manage the HR manager.

- Manage the School policy framework to ensure the Governing Body

fulfils its legal duties.

**Clerk to the Governors**

- As Clerk to the Governors, liaise with the Chair of Governors and Head over the agenda for Governing Body meetings.

- Co-ordinate the sub-committee meetings.

- Prepare the agenda and minutes and other documentation for the

meetings of the Board of Governors and their committees.

- Receive and send out paperwork to all Governors, including minutes, prior to meetings, allowing one week for reading time.

- Provide information as required by the Chairperson, Governor

Committees and Governors with specific responsibility at any time.

- Oversee any Governor training and maintain a register of Governor visits to School.

- Advise Governors on financial, legal and estates matters.

- Maintain the School’s Asset Register.

- Oversee safe recruitment and induction of Governors.

- Act as Company Secretary, ensuring all reporting and regulatory

requirements are met.

**School Representation**

- Represent the School in the relevant local and national Bursar forums as

agreed with the Head.

- Represent the School as an active member of the Parents’ Association

(SASS).

**PERSON SPECIFICATION**

**Essential**

The successful candidate is expected to have a relevant professional, accounting and/or SBM Level 5 qualification or appropriate SBM level, and be able to demonstrate strong financial management skills. The successful applicant will have a record of accomplishment of effective leadership, having managed teams, resources, systems and be able to demonstrate vision and leadership in previous roles. The successful applicant will be a team player, able to maintain tight administrative procedures within the conflicting demands of a busy school. He or she will enjoy working with people and will have the vision and creativity to make the most of the School’s assets and resources, both physical and financial. The Bursar will be well presented and articulate, with a sense of humour and an ability to maintain confidentiality. The highest level of personal integrity will be essential, and the Bursar will be comfortable dealing with, and building, good working relationships with parents and staff and presenting information to the governing body in both written and oral form. He/she will be confident about using a variety of computer applications, particularly Excel, PASS and ISAMS.

**Desirable**

The candidate should have an understanding of educational needs: It is not necessary for the candidate to have worked in a school previously,

but it is vital to be aware of the School’s educational focus and future goals.

Although it is not a requirement to be an IT expert, a commitment to use, promote and develop technology is required.

**CONDITIONS OF SERVICE**

The Bursar’s salary will be dependent upon the experience of the successful candidate. The Bursar will be entitled to join the staff pension scheme and receive a discount on School fees for any children attending St Aubyn’s School. The working day is from 8.30 am to 5.30 pm each day during term time, with a free breakfast and School lunch provided while School is operational. Six weeks holiday is allowed each year (in addition to Bank Holidays), with this time to be taken during School holidays.

Staff accommodation is available at discounted rent for up to 4 years for staff moving from outside of London.

**PROCEDURE FOR APPLICATION**

Applications should be made using the School’s application form and forwarded with a letter of application to Mr Abrie Botha, Chair of Governors, St Aubyn’s School, Bunces Lane, Woodford Green, Essex, IG8 9DU or via email to k.pickersgill@staubyns.com by Sunday, 20 June 2021*,* after which references will be taken up for those candidates considered for the shortlist. Please mark any correspondence ‘Strictly Private and Confidential’. Position on the shortlist will be subject to satisfactory references being received. The appointment will be conditional subject to satisfactory pre-appointment checks being completed. It is hoped that the successful candidate will begin work after the Christmas term.