

Bursar Modular Job Description

The modular job description which follows is designed to help when drawing up a job specification, reviewing an existing post or advertising a new one.

The description is divided into sections as follows:

- STRATEGIC ROLE
- FINANCE
- PERSONNEL MANAGEMENT
- ESTATE MANAGEMENT
- WHOLE SCHOOL ADMINISTRATION
- MARKETING

It is expected that all bursar jobs will broadly cover the functions set out in the Strategic Role section. For all other sections, whether specific functions are included in the job specification will depend on the circumstances of the particular school. In other words, schools should be selective in deciding which functions will be relevant for the type of bursar they need, and should adapt the wording of functions as needs be. *Nothing in this document should be taken as mandatory, or limiting what can be done – it is offered as advice based on developing good practice.*

All bursar posts have management responsibilities, and it is increasingly becoming the norm for bursars to be members of Senior Management Teams. Whether bursars undertake all the tasks in this document personally or delegate them to other support staff, their senior management responsibility remains.

CORE FUNCTIONS: ALL SCHOOLS

Strategic Role

The bursar will normally be responsible to the Head as their line manager and it is usually appropriate for them – if they are playing a significant strategic role – to be a full member of the Senior Management Team (SMT).

- I. To be responsible for strategic planning aspects including all financial implications and ensuring that the school makes the best possible use of resources available.
- II. To be responsible for all or the majority of the disciplines of Finance, Personnel Management, Estate Management, Administration, all general Training and Development of staff, and all matters within the management of the school which are supportive to, but do not involve, the teaching function.
- III. To be responsible for effective 'Risk Management', for example, in Health and Safety and in the management of any third party service contracts.

VARIABLE FUNCTIONS: ACCORDING TO INDIVIDUAL SCHOOL NEEDS

The following three tables cover Finance; Personnel Management; Estate Management; Whole School Administration; and Marketing.

TABLE 1	Finance	Personnel Management	Estate Management	Whole School Administration	Marketing
Basic Functions	Improving school resource management by – 1.1 Budgets/ Monitoring/ Financial reports/ Payroll 1.2 Cash Management 1.3 Securing funds to which school is entitled	1.4 Recruiting and Managing Support Staff	1.5 Basic Premises management 1.6 Health and Safety management		

FINANCE – IMPROVING SCHOOL RESOURCE MANAGEMENT:

- 1.1a To advise the Head and Governors on investment and financial policy, preparing appraisals for particular projects and for the development of a business plan (long term financial strategy) for the future development of the school.
- 1.1b To prepare for approval by the Head and Governors the annual estimates of income and expenditure. To obtain agreement of budgets, and to monitor accounts against budgets. To prepare regular management accounts for budget holders and to report on the financial state of the school to the Governors.
- 1.1c To use financial management information, especially benchmarking tools, to identify areas of relative spend, assess trends and directly advise the SMT accordingly.

- 1.1d To be responsible for the management of the school accounting function, ensuring its efficient operation according to agreed procedures, and to maintain those procedures by conducting at least an annual review.
- 1.1e To monitor all accounting procedures and resolve any problems, including:
 - (i). The ordering, processing and payment for all goods and services provided to the school.
 - (ii). The operation of all bank accounts, ensuring that a full reconciliation is undertaken at least once per month.
 - (iii). Maintaining an assets register.
 - (iv). Preparation of invoices and collection of fees and other dues, taking legal action where necessary to recover bad debts.
- 1.1f To prepare the final accounts and to liaise with the auditors. To provide detailed management accounts for the Governors and Head according to an agreed schedule, reporting immediately any exceptional problems.
- 1.1g To be responsible for the provision of a comprehensive payroll service for all school staff, with operation of the various pension schemes and other deductions in which the school participates.
- 1.1h To prepare all financial returns for the DfES, LEA, and other central and local government agencies within statutory deadlines.
- 1.1i To be responsible for dealing with the school's rating assessment and VAT liabilities and advising on the financial implications of charitable status with respect to the current and any future tax legislation.
- 1.2 To maximise income generation within the ethos of the school.
- 1.3 To be the point of contact with central and other agencies with regard to grant applications, gifts and other donations.

PERSONNEL MANAGEMENT

- 1.4a To be responsible for general personnel matters. For the clearance for new staff – medical checks, child protection, and to issue contracts of employment. To give advice to Governors on assessment of salaries, expenses, sickness and maternity procedures, redundancy and other matters of dismissal. To attend at Employment Tribunals as necessary. To maintain confidential staff records and to ensure that staff records held in the school by others are kept confidential.

- 1.4b To provide leadership and guidance for support staff, including direct line management responsibility where appropriate – administrative and clerical, financial, technicians, medical, welfare and teaching assistants, premises and maintenance, ground staff, cleaners and caterers.
- 1.4c To be responsible for the recruitment, professional development, appraisal and training of all support staff.
- 1.4d To plan for, arrange and report on Staff Development aspects for all staff.

ESTATE MANAGEMENT

- 1.5a To be responsible for the maintenance of the school site and the buildings, the preparation of maintenance schedules and the efficient operation of all facilities on the property. Also for the installations and plant for lighting, heating, domestic hot water, cooking, ventilation, water softening, energy conservation etc.
- 1.5b In co-operation with the Fire Service be responsible for the installation and maintenance of equipment for protection against and escape from fire. To keep records of and to initiate regular fire practices and alarm tests. To ensure emergency procedures are current and timely.
- 1.5c To be responsible for the security of the school site.
- 1.5d To be responsible for the upkeep of playing fields, gardens, all weather surfaces, tennis courts and land drainage. To ensure the maintenance of boundaries, footpaths, roads and rights of way.
- 1.5e To purchase, repair and maintain all furniture and fittings.
- 1.6a To know about the main health and safety issues specific to the school and how they relate to students, staff, visitors and contractors.
- 1.6b To know what the elements of fire safety are and the associated risks to the school through the process of risk assessment.

TABLE 2	Finance	Personnel Management	Estate Management	Whole School Administration	Marketing
Inter-mediate Functions (additional to Basic Functions)	2.1 Securing bid-based competitive funds 2.2 Services contract management (catering/cleaning etc) 2.3 Insurance (inc. supply teacher cover)	2.4 All staff employment contracts, admin for teacher recruitment	2.5 Maximising lettings income 2.6 Premises strategy, services and contracts management 2.7 Effective Risk Assessment	2.8 ICT manager (Purchasing/contract management/ Liaison with LEA/DfES/feeder schools)	

FINANCE

- 2.1 To be responsible for securing bid-based competitive funds by effective use of bidding systems and contacts.
- 2.2a To negotiate, manage and monitor contracts, tenders, and agreements for the provision of support services. To purchase, either directly or indirectly, the school's energy supplies.
- 2.2b To be responsible for the arrangements for school facilities including: i) catering; ii) transport including the minibus(es) and drivers; iii) the school shop; iv) bookings for school facilities; v) provision of facilities for additional tuition out of school hours including music.
- 2.3 To be responsible for seeking professional advice on insurance and advising the Governors on the appropriate insurances for the school. Implementing the approved insurances, and handling any claims that arise.

PERSONNEL MANAGEMENT

- 2.4 To be responsible for all staff contracts and co-ordinate the administration for teacher recruitment.

ESTATE MANAGEMENT

- 2.5 To be responsible for the letting of the school premises to outside organisations and school staff, and for the development of all school facilities for out-of-school use, with particular reference to the local community.
- 2.6 To acquire and dispose of land and buildings as authorised by the Head and Governing Body. To draw up outline specifications for new buildings, obtaining tenders, obtaining planning permission, and liaison with building contractors and the school architect.
- 2.7a To know about risk assessment tools and how to use them to establish hazards within the school and the associated risk involved.
- 2.7b To be aware of the importance of a disaster recovery plan and its place within the management procedures of the school.

WHOLE SCHOOL ADMINISTRATION

- 2.8a To manage the administrative function including the administrative ICT facilities, school reception, reprographics, records and telephones.
- 2.8b To be responsible for the systems and general management of the school's administrative and financial computer network, the implementation of appropriate Management Information Systems and the full computerisation of the administration accounting and record system, including desk top publishing. Acting as System Manager for the administrative computer network.
- 2.8c To provide for the preparation and production of all school records and publications.
- 2.8d To maintain Pupil Records including when appropriate the Assessment Process.
- 2.8e To act as correspondent for the Department for Education and Skills and to be responsible for the records and returns required.
- 2.8f To be responsible for obtaining the necessary licenses and permissions and ensuring their relevance and timeliness.

TABLE 3	Finance	Personnel Management	Estate Management	Whole School Administration	Marketing
Advanced Functions (additional to Basic and Intermediate Functions)	3.1 Securing sponsorship funding	3.2 Advice on employment law	3.3 Implement Risk Assessment and loss prevention strategies	3.4 Advice to heads/governors on admissions 3.5 Relationship management (teachers/support staff)	3.6 Promoting school to parents, partners and local community

FINANCE

- 3.1 To be responsible for securing sponsorship funding using ‘commercial flair’ and developing contacts.

PERSONNEL MANAGEMENT

- 3.2a To advise the Governors on the policy needed to comply with legislation concerning employment protection, equal pay, sex discrimination etc. and the implementation of these policies in the school.
- 3.2b To formulate, monitor and implement the school’s safety policy to comply with the requirements of Health and Safety at Work Act and other legislation.
- 3.2c To act as the school’s Health and Safety Co-ordinator and Fire Officer.

ESTATE MANAGEMENT

- 3.3a To know the elements of a comprehensive disaster and recovery plan and operate the elements linked to the resource management responsibility.
- 3.3b To implement risk management and loss prevention strategies in the school to reduce insurance costs.

WHOLE SCHOOL MANAGEMENT

- 3.4 To provide advice to Heads and Governors on admissions and appeals policy; to develop a school admissions and appeals policy.

3.5 To act as a 'bridge' to facilitate closer working relationships between teaching and support staff.

MARKETING

3.6 To promote the school to different audiences and raise the profile within the local community. Liaise with local businesses for fundraising, arranging vocational experience and joint projects.