

**Annecy Catholic Primary School  
Bosco Catholic Education Trust**

**Job Description: Bursar**

Grade 7 Salary Points 14-19 £23,311 - £25,736 (£16,103 - £17,124 pro rata)  
Hours of Employment: 30 hours per week, term time plus Inset plus 2 weeks  
Accountable to: Head Teacher

Line Manager to: Premises Officer

**Finance - Key Purpose**

To manage the disciplines of Finance and Facilities Management within the school.  
To work with the Chief Finance Officer of Bosco Catholic Education Trust to ensure compliance with the requirements of an academy school.

**Main Finance tasks**

- Contribute to the strategic planning process, providing advice on financial implications and ensuring that the school makes the best possible use of resources available.
- Advise Head Teacher and Local Governors on financial policy, procedures and planning
- Prepare annual budget and regularly monitor accounts and report on the financial state of the school to the Local Governing Body.
- Use financial management information, including benchmarking, to identify areas of relative spend, assess trends and directly advise the SLT & Local Governors accordingly
- Manage the school accounting function, ensuring its efficient operation according to agreed procedures, and maintain these by conducting at least an annual review.
- To control accounting procedures to ensure compliance, including:
  - i. The ordering, processing & payment for goods & services provided to the school
  - ii. The operation of the bank account, ensuring regular reconciliation is undertaken
  - iii. Maintaining an assets register
  - iv. Preparation of invoices and collection of fees and other dues.
- To undertake monthly reconciliation of staff costs downloaded from EPM and resolve

- Regularly provide Budget monitoring information to the Headteacher and Local Governors according to an agreed schedule, reporting immediately any exceptional variance.
- To attend meetings of the Local Governing Body as required
- To liaise with the Trust's auditors as required.
- To maximise income generation within the ethos of the school
- To assist the Trust to negotiate, manage and monitor contracts, tenders, orders and agreements for the provision of support services, including the school's energy supplies

### **Health & Safety & Facilities Management**

- To ensure that procedures relating to Health and Safety, fire safety, security and other legislation relating to facilities management are observed.
- To know about risk assessment tools and how to use them to establish hazards within the school and the associated risk involved. Ensure that risk assessments are undertaken where appropriate
- To advise the Headteacher and Local Governors on implementation of the Premises Development Plan.
- To provide guidance, in consultation with other agencies as appropriate, on a disaster recovery plan and implement the elements relating to resource management.
- To regularly monitor Utilities & where appropriate consider improved efficiency.
- To liaise with the Premises Officer and CFO to arrange reactive maintenance and ensure timely resolution of premises-related issues.

### **Human Resources - Key Purpose**

To ensure effective Human Resource (HR) management and administration within the school in compliance with legal requirements and good practice.

### **Main HR tasks**

- To administer staff recruitment.
- To arrange DBS, medical etc clearance for new staff.
- To arrange contracts for new staff and administer contractual changes for existing staff.
- Maintain staff details on SIMS.
- To advise the Headteacher, Staff and Local Governors on assessment of salaries, sickness and maternity procedures, redundancy procedures, dismissal and all other aspects of personnel administration in conjunction with the CFO and the Trust's HT advisors
- To ensure induction procedures are up to date and observed for all teaching and support staff.
- To provide advice on training opportunities for support staff and liaise with training providers as required.

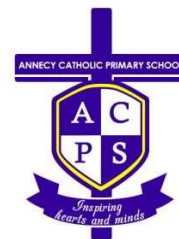
- To assist in the development and implementation of performance management procedures for support staff.

### **Whole School Administration**

- Be responsible for the systems and general management of the school's administrative and financial computer network and the implementation of appropriate management information systems. Act as system manager for the administrative computer network.
- Undertake SIMS upgrades as notified
- Process DBS Checks for Volunteers and Local Governors and maintain the school's Single Central Record.
- To ensure regular review and updating of emergency planning procedures
- To ensure compliance with Data Protection legislation and provide related support and advice to the Headteacher and Local Governors, in conjunction with the Trust's Data Manager
- To consider the implications of FOI legislation and ensure that appropriate policies are applied
- To complete census returns
- To perform any tasks or duties that may be reasonably assigned to you by the Headteacher to ensure the smooth running of the school.

### **Other Tasks**

- To undertake first aid training
- To provide cover of the front reception as required, including lunch breaks



## School Bursar

### PERSON SPECIFICATION

The person specification shows the abilities and skills you will need to carry out the duties in the job description. Short-listing is carried out on the basis of how well you meet the requirements of the person specification.

**YOU MUST COMPLETE YOUR STATEMENT OF SUITABILITY BY ANSWERING THE POINTS LISTED IN THE PERSON SPECIFICATION BELOW IN NUMBER ORDER.**

You should mention any experience you have had which shows how you meet these requirements. If you are selected for interview you may be asked to undertake practical tests to cover the skills and abilities shown below (where applicable).

### Qualifications and Experience - Essential

1. English and Maths GCSE or equivalent
2. Experience in a similar role and/or banking/finance

All of the following are desirable, however training will be given for the right applicant in any areas that are necessary:

### Ability, Skills, Knowledge

1. Ability to manage budgets
2. Knowledge of financial reporting, procurement and fixed assets
3. Financial analysis and reporting
4. Competent IT skills
5. Premises maintenance knowledge
6. Ability to use initiative, prioritise and meet deadlines
7. Experience of Managing a small team and able to work as part of a team
8. Ability to work effectively with all stakeholders
9. Excellent communication skills
10. Cash handling and reconciliation
11. Knowledge of Access Budgeting and Finance Systems
12. Health & Safety experience

13. An awareness and understanding of safeguarding responsibilities of all adults who work with children
14. Understanding of SIMS
15. Ability to maintain a positive and professional demeanour
16. Sense of humour
17. 'Can do' attitude

The successful candidate must be able to demonstrate a commitment to the school vision, aims and ethos, the school community and the school improvement agenda.