

CHESHIRE EAST COUNCIL

JOB DESCRIPTION QUESTIONNAIRE

JOB TITLE	Bursar - Primary School	JOB REF NO	AAAD5045
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BASIC JOB PURPOSE

To support and advise the Head teacher and governors in the interpretation, planning, decision making and monitoring of Local Management of the school.

NO	MAIN RESPONSIBILITIES
1.	Prepare and formulate the school budget, (including financial alternatives), in conjunction with the Headteacher to enable the Governing Body to make accurate management decisions.
2.	Monitor and control the implementation and virement of funds to ensure that the budget is administered according to the agreed School Development Plan.
3.	Monitor and review the school budget and advise the Headteacher and Governing Body on the strategic budgetary position to ensure over and under spending areas are identified, and proposals made, to enable corrective action to be taken.
4.	Prepare reports, including recommended action, on financial matters for the Governing Body and attend meetings to give advice to facilitate the decision making process.
5.	Input and maintain all financial information (including raising orders and processing invoices to ensure accurate information is available and financial regulations are followed.
6.	Administer the unofficial school fund and / or financial activities not financed from the school funds. Maintain appropriate accounts and reconcile bank statements to ensure that funds are controlled in accordance with financial regulations
7.	Liaise with contractors/suppliers concerning the ordering of goods and supply of services to the school and monitor the service provided to ensure the optimum use of resources.
8.	Develop, implement, coordinate, review and manage the school's office, administrative and financial systems to maximise the effective coordination of all school support activities.
9.	Monitor, coordinate and implement arrangements for the care, maintenance and improvement of buildings, equipment and grounds in consultation with School's Health and Safety Representative to ensure the Health and Safety of school community is safeguarded.
10	Oversee the maintenance of pupil records, including registration, admission and transfer procedures and associated statistical analysis for Headteacher, LEA and DFEE returns to meet management and statutory requirements.
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.	

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

<u>No and FTE</u>	<u>Levels / grades</u>	<u>Types of work</u>	<u>Where based</u>
variable	Contractors	Builders, electricians, joiners etc	Working on school site

variable	Supply teachers to cover for planned and unplanned absence	Teachers	School
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What does the supervision of these people involve?

Arranges and oversees maintenance. Specifies contract requirements relating to goods and services. Agrees timescale, monitors work, ensures health and safety and security of site is maintained and log book signed.

Contacts supply staff to cover absence, general school induction, completion e.g. pay documentation.

Arranges cover for absent support staff.

Provides training on financial matters to senior teachers.

3 RESPONSIBILITY FOR PHYSICAL RESOURCES

Physical resource	Nature of responsibility of jobholder	How often is the responsibility exercised?
School building and grounds:	<ul style="list-style-type: none"> • Arranges for repairs and maintenance to be carried out 	
Stocks and Supplies:	<ul style="list-style-type: none"> • Orders all supplies and equipment for school • Researches for best value, and negotiates on price 	Daily
Records and Information: <ul style="list-style-type: none"> • Financial records, LMS Budget, School Fund, Imprest • Inventory of assets • Diaries and calendars of events 	<ul style="list-style-type: none"> • Completes and / or checks forms for authorisation by Head Teacher • Prepares financial reports for Governors • Takes minutes at Governor and other meetings • Develops administrative systems to improve the efficiency of office procedures. 	Daily
Equipment: Office equipment, alarm systems etc	Monitors contracts, organises repairs and maintenance.	Daily

4 RESPONSIBILITY FOR IMPACT ON PEOPLE

<u>Task/Duty</u>	<u>Who benefits?</u>	<u>How they benefit?</u>
Giving advice on a variety of school related matters including admissions and transfers and responding to telephone and personal enquiries	Pupils, parents, professionals, contractors, general public., governors	Accurate information given, enables teaching staff to focus on teaching responsibilities
Coordinates Health and Safety of site, buildings	School community and visitors	Safe, hygienic surroundings
Oversee administration of recruitment process for all staff – advertising, letters for interview, obtaining all checks (CRB, medical, OHU, references), notification of appointment and issue of contract.	Staff and potential staff. Pupils and parents	Efficient recruitment service. Suitably qualified and checked staff engaged.
Oversees checking of attendance registers and takes appropriate action on absence; contact parent, EWO, Social Services	Pupils, parents, Education Welfare Officers, Social Services.	Prompt action taken, good attendance encouraged, potential problems highlighted
Reception of visitors, responding to telephone enquiries	Pupils, parents, professionals, contractors, general public	Comfortable, welcoming impression, accurate information given.
School lettings – sends out confirmation letter, deals with any problems eg defective equipment.	Hirers of school facilities	Room available with appropriate facilities.

5 KNOWLEDGE

Type of knowledge	What knowledge is essential?	Why are these needed?	How is it normally acquired?
Qualifications, Experience and Specialist Knowledge	Knowledge of systems relating to finance. General office and administrative skills	To set and monitor budget, and to set up and use systems.	NVQ3 or equivalent standard + 3 -5 years experience in financial administration
Equipment and tools	Ability to use general office equipment.	Day to day use, maintenance and trouble shooting.	On the job experience
ICT skills	Word processing and financial software packages, Email + Spreadsheets	Develop systems for record keeping, and day to day financial management and data input / reporting	Internal training + on the job experience
Organisational	General knowledge of CCC Education Service, support services and other professionals associated with the school. Working knowledge of the Governing body procedures	To understand who does what, where to obtain information & resolve problems To service meetings and understand how decisions are made	On the job experience
Policies and Procedures	Working knowledge of: H & S, Data protection, DDA, CCC Financial Regulations, Child Protection, LEA and School policies and procedures Understanding of the school context, including external links. Structure and layout of the school	To ensure compliance and to implement and develop systems and procedures. To respond to changes in policy. To be aware of staff roles and responsibilities, enable networking and sharing of information.	On the job experience

How long would it take for a jobholder to become fully operational? Within 3 to 6 months the jobholder should be operating pupil, financial and personnel systems but it would take a year to experience the full academic year and financial cycle and acquire the specific local and council knowledge including support mechanisms and develop range of contacts.

6 MENTAL SKILLS

- a) What sort of situations/problems does the jobholder **typically** have to deal with? Give two examples of **typical** problems solved on a regular basis.

Example Planning and developing new systems – The jobholder is required to set up new systems to meet new requirements and guidelines, eg setting up a school asset register. This involves obtaining relevant information, carrying out research into options and developing a system that suits the school, briefing staff on it's use and implementing the system. After implementation, evaluating, reviewing and, as necessary, updating or improving the system.

Supply and Replacement staff - Staff reporting absent are required to phone the school office. On receipt of the call, the job holder sources replacement staff from a list of suitable people. From time to time, the job holder sources (by advertising) other supply teachers who were previously unregistered. The job holder carries out all administrative procedures related to the recruitment process.

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

Example: Budget setting cycle: Analysis of the income available to the school and planning and setting the budget for approval by the Governing body, based on; monies available, previous experience and historical data. Job holder ensures that the budget reflects the School Development Plan and also sets aside monies for future expenditure on school plans.

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

<p>Annual event but ongoing throughout year</p>
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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?
Development and design	School administration systems including financial reporting systems to meet the needs of school
Analytical	Monitoring and reconciliation of budget statements against local records. Analysis of data to provide reports and statistics.
Fact finding and problem solving	Determining where financial errors have occurred and taking steps to have them rectified To import best practice in order to improve school systems and procedures.
Planning	Budgets to meet present and future school development plan. Servicing governors meetings. Responding to the needs of the annual school cycle.
Judgement	Allocation of budget across school departments.

7 INTERPERSONAL AND COMMUNICATION SKILLS ESSENTIAL FOR THE JOB

Skill	Used for?	With whom?
Written skills – High standard of presentation and accuracy essential. Some documents highly confidential.	<ul style="list-style-type: none"> • Draft correspondence on behalf of Head Teacher • Set up of standard letters • Giving clear, practical instructions 	Parents, governors, staff, outside agencies, Head teacher, suppliers, contractors, area office
Persuasion and negotiation with tact and diplomacy	<ul style="list-style-type: none"> • To obtain best price, agree suitable timescales, after sales service according to specific school requirements • Obtain services of a contractor 	Contractors, suppliers, outside agencies, staff, parents.
Oral skills –tact, diplomacy and sensitivity required when dealing with parents who may be upset or angry.	<ul style="list-style-type: none"> • Respond to telephone calls and receive visitors to reception, checking ID and ensuring signing in procedures are carried out. • Give precise and accurate instructions, resolve problems • Obtain and give information • Liaison on behalf of school 	Parents, pupils, staff, professionals, education staff, transport drivers, contractors, suppliers, governors, general public, hirers of school facilities.

8 PHYSICAL SKILLS ESSENTIAL FOR THE JOB

Physical skill	Used for?	Any precision/speed requirements?
Hand/eye co-ordination and dexterity	Keyboard skills – to input accurate data, maintain records, word process documents, cross check records – fundamental to the job.	Accuracy

9 INITIATIVE AND INDEPENDENCE

Allocation of work

a) How is work allocated to the jobholder?

There are delegated tasks which are discussed with the Head Teacher. The nature of the job means that the job holder has responsibility for running the school office and therefore, once a plan has been agreed for key tasks, the job holder progresses these by use of own initiative. The Head Teacher checks progress on a regular basis.

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

Most routine work is cyclical with known deadlines, eg weekly etc, other work is reactive to issues as they arise – telephone, incidents, staff requests, callers etc. Special projects are requested by Head teacher on ad hoc basis

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)

- Suggests improvements to current practices to improve efficiency.
- Works on policy development relevant to finance and administration procedures in conjunction with the Head Teacher, for approval by governors.
- Deploys staff effectively

to allocate their time to duties?

Total scope but within known priorities and deadlines. The Head Teacher may request reprioritisation for specific piece of work.

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

School and LEA policies and procedures and CCC procedures and guidelines, including personnel, finance and health and safety. Job holder is relied upon to offer interpretation of these for colleagues and Governors.

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

Regular contact with Head Teacher to agree common goals for events and tasks. There are regular school briefings and team leader meetings, plus formal meetings to discuss school diary and plan joint projects. Expected to use initiative to deal with some unexpected issues. The Head Teacher will be available for advice and guidance on serious problems.

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
Obtaining supply and replacement staff – often at short notice.	Initiative, experience, knowledge of personnel procedures	Few times a week

Check and reconcile Unit 4 ledger to ensure correct staff payment	Council financial regulations and payroll systems	Several times a year
Unexpected problem	Nature of available guidance	Typical Frequency
School closures due to oil shortage, power failure, water cut off etc. The job holder would take initiative to get the decision re school closure made and then take steps to implement.	Experience, precedents, knowledge of procedures	Occasional

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
Personnel code of conduct issues, Staff requests for leave in term time for non-medical reasons	Refer to Head teacher and / or governors for decision	Occasional
Parental complaints or expressions of dissatisfaction following refusal of pupil admission request.	Refer to line manager in accordance with admission procedure	Several times a term
CBS related issues – related to satisfaction with service	To Head teacher	Occasional

10 PHYSICAL DEMANDS Physical Demand	Typical Duration	How often?	Other details (eg how heavy?)
Using keyboard together with normal office demands, eg filing.		Throughout working day	

11 MENTAL DEMANDS OF THE JOB

Nature of task	Mental Demand	Duration	Frequency
<ul style="list-style-type: none"> • Preparation and formulation of budgets • Monitoring and checking budget statements including year end and following up discrepancies • Maintaining financial records, including data entry • Reconciliation of imprest • Processing of invoices, raising 	Concentration, accuracy & attention to detail, awareness & alertness, checking the work of others and identifying where errors have occurred. confidentiality of information. Listening and		

orders & invoices <ul style="list-style-type: none"> Producing financial and statistical reports for Governors, LEA, DFEE. Composing newsletters and letters Attendance at meetings and minute taking 	interpreting information		
Dealing with visitors and phone calls	Awareness, alertness to security issues, Attention to detail		

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 – inherent part of job	From phone, callers, pupils, governors, external bodies and organisations, parents, staff –the jobholder often has to leave job in hand to deal with new demand		Throughout working day
Deadlines	Year end returns, budget cycle, parental consents (for visits, medicals etc). Governors meeting cycle.		
Conflicting demands	Job holder has to mentally switch between a wide range of enquiries, respond to staff needs and meet unexpected situations arising during the working day.		

12 EMOTIONAL DEMANDS

Nature of the task being performed by jobholder.	Behaviour / source of the emotional demand	Frequency (per day/wk/ month)
Typing up reports and entering data re; staff on pupils that is highly confidential	Privy to sensitive and confidential information, and awareness of the need for strict confidentiality	Few times a year

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
Office within primary School	100%

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?

No

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?
Verbal abuse from parents – either face to face or on the phone		Few times a year

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

None

OTHER CONSIDERATIONS

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

There is a constant need to keep up to date with new procedures, education initiatives and other imposed changes to ways of working.