



# APPLICATION FORM



# School Business Manager

## CONTENTS

Job description

Person specification

Application procedure



# For: School Business Manager

**Start date: May 2026**

**Salary: Band J 44-48 (£55,595-£60,593 FTE)**

In this role, the post holder will be responsible to the **Headteacher**

**Actual annual salary:** £55,595-£60,593 FTE (subject to annual pay review)

**Hours:** 37 (will consider 30)

**Working weeks:** 52

Further details about the school can be found on the school website: [www.poolegrammar.com](http://www.poolegrammar.com)

**The responsibilities of the postholder will include the following areas:**

## Health, safety and safeguarding

The post holder must:

- fully abide by the school's safeguarding policy;
- fully abide by the staff Code of Conduct and any applicable Health & Safety, cyber-security and risk management policies.

## Main job purpose:

- To work as part of the Senior Leadership Team to ensure that the school meets its educational aims and to directly assist the Headteacher.
- Responsible for providing professional leadership and management of school finance, premises and other support staff, to enhance their effectiveness in order to achieve improved standards of learning and achievement in the school.
- To promote the highest standards of business ethos within the administrative function of the school and strategically ensure the most effective use of resources in support of the school's objectives.
- The School Business Manager is responsible for the Financial Resource Management (including budget setting)/ Administration Management / Human Resources/Library/Marketing/ Facility & Property Management / Health & Safety Management of the school.
- To ensure that the school meets its legal requirements and statutory obligations as an Academy, Limited Company and a Charity; including the Trading Subsidiary.

## Main responsibilities and duties:

The post holder must:

- Provide a comprehensive administrative, clerical and secretarial service in a context that will require appropriate confidentiality.

## **Leadership and Strategy:**

The post holder must:

- Attend Senior Leadership Team and appropriate Governors' committee meetings.
- Negotiate and influence strategic decision making within the school's Senior Leadership Team, with particular focus financial planning and financial sustainability.
- In the absence of the Headteacher / Deputy Headteachers, take delegated responsibility for financial and buildings/premises decisions, including Health and Safety.
- Plan and manage change in accordance with the School's long term strategic aims and the annual School Development Plan.
- To lead and manage finance, premises, catering, administrative, library, marketing and HR school support staff.
- To be Company Secretary. To be a Director of the Trading Subsidiary

## **Financial Resource Management**

The post holder must:

- Evaluate information and consult with the Senior Leadership Team and Governors to prepare a realistic and balanced budget.
- Lead and advise on the overall financial planning process.
- Produces the school budget, involving discussion and agreement with the Headteacher, SLT and Resource Governors committee.
- Use the agreed budget to actively monitor and control performance to achieve value for money. Use external benchmarking to help achieve value for money.
- Identify and inform the Headteacher and Governors of the causes of any significant variance and take prompt corrective action.
- Produce monthly forecasting with revisions to the budget, if necessary, in response to significant or unforeseen developments.
- Provide ongoing budgetary information to relevant people.
- Prepare monthly cash – flow forecasts to ensure that the school cash position is consistent with its obligations.
- Advise the Headteacher and Governors if fraudulent activities are suspected or uncovered.
- Maintain a strategic financial plan that will indicate the trends and requirements of the school development plan and will forecast future year budgets.
- Identify additional finance required to fund the school's proposed activities.
- Seek and make use of specialist financial expertise.
- Assist and supervise other staff in the operation of the school's financial system.
- Provide training and support for all staff with budget holder responsibilities in order to promote effective financial management and best value for money.
- Maximise income through lettings and other activities.
- To recommend to the Finance Committee types of investments which are appropriate for the school, ensuring full compliance with the appropriate use of public funds and taking no financial risks.
- Present timely and fully costed proposals, recommendations or bids.
- Put formal finance agreements in place with suitable providers for agreed amounts, at agreed times and appropriate agreed costs and repayment schedules.
- Establish and monitor service level agreements (e.g. utilities & insurances) and contracts and oversee their delivery and value for money.
- Monitor the effectiveness and implementation of agreements. Prepare all financial returns to the DfE and other relevant agencies within statutory deadlines.
- Prepare the annual accounts and lead in the preparation of the Annual Report working with the Governing Body. Meet with and work with the appointed auditors to ensure that the financial systems are both effective and efficient.
- Ensure all relevant documentation is filed at Companies House to meet statutory deadlines.
- Oversee the management of the school payroll system and ensure full reconciliation.

- To act as the main account holder for bank accounts, charge cards and business account cards including on-line access. Act as joint signatory on all relevant bank and building society accounts; charge cards.
- To oversee the maintenance and operation PS Financials, cashless catering and Parent Pay, the school's computerised accounting systems.
- Lead the interface with the school's auditors, both internal and external, to meet the statutory requirements and tight deadlines. Execute any actions and recommendations identified by the school's auditors.
- In conjunction with the Catering Manager, to negotiate and manage hot meal agreements with local schools to sustain and develop the school's Trading Subsidiary.
- To compile the annual Old Grammarians Trust accounts, gain approval from auditors and submit to Charities commission.

## Facility and Property Management

- Ensure the supervision of planning and construction processes is undertaken in line with contractual obligations.
- Ensure the safe maintenance and security operation of all school premises.
- Manage the maintenance of the school site including the purchase and repair of all furniture and fittings.
- Ensure the continuing availability of utilities, site services and equipment.
- Follow sound practices in estate management and grounds maintenance.
- Monitor, assess and review contractual obligations for outsourced school services.
- Ensure a safe environment for the stakeholders of the school to provide a secure environment in which due learning processes can be provided.
- Ensure ancillary services e.g. catering, cleaning, etc, are monitored and managed effectively.
- Manage the letting of school premises to external organisations, for the development of the extended services and local community requirements including use of the new Sports Centre.
- Seek professional advice on insurance and VAT and advise the SLT on appropriate insurances for the school and implement and manage such schemes accordingly.
- Manage the rolling 5-year site development plan, ensuring costs are included within budgets
- To investigate and pursue the availability of grants in support of sustainable energy resources and plant.
- To investigate and pursue all Capital Funding grants available for the improvement of school facilities.
- Maintain regular tree inspections and action any findings. Ensure all dangerous trees or branches are removed.

## Health and Safety

- Act as the school's Health & Safety Co-ordinator and Fire Officer.
- Plan, instigate and maintain records of fire practices and alarm tests alongside the Operations Manager.
- Ensure the school's written health & safety policy statement is clearly communicated and available to all people.
- In conjunction with the Site Team ensure the health & safety policy is implemented at all times, put into practice and is subject to review and assessment at regular intervals or as situations change
- In conjunction with the Site Team, enable regular consultation with people on health and safety issues.
- Ensure that the school complies with statutory requirements.
- Liaise with Site Manager and HR Manager to ensure that all qualifications are maintained.
- Ensure systems are in place to enable the identification of hazards and risk assessments.
- In conjunction with the Site Team, ensure systems are in place for effective monitoring, measuring and reporting of health and safety issues to the Senior Leadership Team, Governors and where appropriate the Health & Safety Executive.
- Ensure the maximum level of security consistent with the ethos of the school.
- Oversee statutory obligations are being met for students and staff with DDA Equality Act requirements, ensuring that financial and supporting agency services are adequate for their diverse needs.

## Administration Management

- Manage the whole school administrative function and be the overall lead all support staff.
- Responsible for the day-to-day management of the front office team overseeing school wide initiatives such as school photos, new entry systems, immunisation campaigns.
- Design and maintain administrative systems that deliver outcomes based on the school's aims and goals.
- Manage systems and link processes that interact across the school to form complete systems.
- Define responsibilities, information and support for staff and other stakeholders.
- Develop process measures that are affordable and that will enable value for money decisions for those managing resources.
- Establish and use effective methods to review and improve administrative systems.
- Use data analysis, evaluation and reporting systems to maximum effect by ensuring systems are streamlined to maximise efficiency and avoid duplication.
- Benchmark systems and information to assess trends and make appropriate recommendations.
- Prepare information for publications and returns for the DfE, LA and other agencies and stakeholders within statutory guidelines.
- Work with Student Leadership groups to review site and catering matters as well as to consider premises projects.
- To prepare and submit the annual returns to Companies House for the Academy Trust and Trading Subsidiary.
- To facilitate the release of funds relating to the Post 16 Bursary and Pupil Premium funding. To maintain records of the allocated funding and prepare internal reports and statutory returns.
- To ensure that the library is run efficiently and is fit for purpose for the school
- Ensure that the website is up to date and contains all legal information including that required for Governance – this includes very specific requirements relating to the governing Board.
- Provide admin and financial support for Old Grammarians.

## HR

- Provide support and advice to HR manager in all elements of HR from appraisals to disciplinaries, performance and sickness management and restructures.
- Ensure pay reviews and letters are completed accurately and in a timely manner.
- Line management of Finance Team, HR, Catering Team, PA to Headteacher and Operations Manager, who are then responsible for the Front Office Team, Premises Team, Catering Team, library and marketing.
- Undertake regular team meetings, staff appraisals and CPD for direct reports.
- Maintain oversight of all support staff, through line management structures.

## School Development

- To contribute to the relevant aspects of the school's strategy and management, particularly regarding community cohesion
- Review and production of the school's sustainability plan and actions
- Maintenance and review of the school Estates strategy Investment strategy; Reserves policy and Finance Manual
- To ensure follow through and completion of planned fundraising initiatives.
- To develop close and effective relationships with possible future financial supporters of the school to ensure their support and to develop new contacts.
- To identify and build relationships with potential donors outside the traditional school constituencies

## General:

This job description is specific to the post of Business Manager. This job description is current at the date shown but, in consultation with you, may be changed by the Headteacher to reflect or anticipate changes in the job commensurate with the job title.



# PERSON SPECIFICATION



## Experience

### Essential

- Managing budgets; financial reporting; fixed assets management, procurement; cash management and investments
- Managing the year end process – audit and reporting
- Managing multiple cross-functional teams
- Managing at a Senior Leadership level
- Managing Health and Safety

### Desirable

- Managing in an educational environment
- Administration and management of payroll and pensions

## Qualifications

### Essential

- Recognised management/business degree level or higher
- Recognised qualification in accounting e.g. AAT, ACCA or qualified through experience

### Desirable

- School Business Manager specific qualification i.e. DSBM, CSBM, ADSBM or MMC School Business Management
- Member of the National Association of School Business Management

## Knowledge and Skills

### Essential

- Able to deliver services and systems for effective school financial management.
- Able to deliver value for money and cost saving initiatives.
- Able to understand financial regulations and implement changes in particular related to SORP, DfE regulations and charity reporting
- Able to lead multiple teams and individuals.

### Desirable

- Knowledge of Charities and Companies House legislation
- Knowledge of the financial implications of academy status

## Personal attributes and qualities

- Highly developed interpersonal skills and communication skills.
- Willingness to constructively challenge the work of self and others to continually improve own and team performance.
- Ability to work under pressure, to prioritise and meet deadlines.
- Enthusiasm and excellent sense of humour
- Confidentiality
- Ability to learn quickly
- Effective Communication with staff
- Excellent relationships with staff
- Adaptable and Flexible
- Excellent time management and organisation



# APPLICATION PROCEDURE



## What you need to do

Please visit [www.poolegrammar.com/work-for-us](http://www.poolegrammar.com/work-for-us) and complete the online application form. Once submitted, you will receive an acknowledgement email.

CVs will be accepted in addition to the above but will not be accepted on their own.

Online application forms are preferred but a PDF and Word version of the application form is available to download from our website. This can be emailed to the HR Department at pgshrdept@poolegrammar.com

Please note, if you use the PDF application form and are using an Apple Mac, please make sure that this is not completed in preview mode as it will not save correctly.

If you have any questions regarding the application process or have not received your acknowledgment email, please contact the HR Department.

## Dates

Closing date for applications: **1<sup>st</sup> March 2026**

Interviews: week commencing: **week commencing 2<sup>nd</sup> March 2026**

**We encourage early applications and reserve the right to interview early, for the right candidate.**

## Safeguarding and equal opportunities

Poole Grammar School is committed to safeguarding and promoting the welfare of children and young people. All successful applicants will be required to complete an enhanced DBS application. Poole Grammar School also promotes equal opportunities for its workforce.

We look forward to receiving your application.

With thanks,

**Katie Etheridge, Headteacher  
February 2026**