



POST: **STEP Associate Business Advisor**

Hours: 37 hours per week, All Year Round
(Holidays to be taken in agreement with Head of Compliance and Finance)

RESPONSIBLE FOR: Office Manager (matrix management)

ACCOUNTABLE TO: Head of Compliance and Finance

MAIN PURPOSE OF JOB

To be responsible for Finance, Personnel, Administration and Resource Management including the quality, development and monitoring of the operational services within the Academy. As a member of the Central Team, the post-holder will support the strategic development of STEP by:

- Working strategically with the Headteacher on the leadership and development of the Academy
- Support & guide Headteachers and other budget holders in their financial management responsibilities
- Assist the Headteacher in the development of local policies and procedures
- Promoting the aims, objectives and ethos of STEP Academy Trust
- Working in partnership with operational leads and Headteachers to enable the academy to work towards or maintain STEP Standards
- Liaising with external agencies as appropriate
- Working with the Headteacher to support the office manager in the implement of STEP Way process and procedures.
- Establishing good working relationships with all stakeholders

Any other duty as required by the line manager to ensure the effective running of the Academy, to include undertaking duties.

KEY RESPONSIBILITIES

1) Strategic Role

- a) Responsibility for strategic planning aspects over current year and three to five year periods where financial implications occur in order for the Academy to make the best possible use of resources available and to keep abreast and advise on current government policies.
- b) To identify, explore and secure external funding for the Academy whilst reporting to the Headteacher, Governors and Trustees where appropriate.

- c) To lead the development, drafting and recommendation of all policies within the remit of the role. These policies will include, but are not limited to, Academy Debt, Communication, Lettings and Charges, Scheme of Delegation, Academy Governance, Financial Delegation, Risk Management and Health and Safety. In developing policies, consideration will be given to Academy needs, action planning, priorities and procedures to ensure that policies are communicated and consulted with staff, contractors, parents, children, the local authority, local academies and other interested parties.
- d) In collaboration, provide vision, strategic direction and leadership in the planning, management and development of effective operations across STEP in finance, business and operational areas.
- e) Monitor the effectiveness of premises, ICT and catering services, with specific reference to quality and, where relevant, financial performance.
- f) Ensuring that the Academy meets its non-teaching legal and statutory responsibilities through advice, direction and support to the Headteacher.
- g) Working within the leadership team to ensure that the revenue and devolved capital funding, equipment and resources are managed efficiently and cost-effectively in support of educational and organisational objectives.
- h) Develop and lead an effective team made up of both directly employed staff and external contractors. The team includes, but is not limited to, Finance, HR, Administration, extended services and clerical support.
- i) Assist with the development and continuous improvement of all non-teaching staff.
- j) To lead engagement and relationship management with the Academy's key suppliers and ensure that supplies, services and works provided to the Academy meet the needs of the Academy and procurement and best value standards.
- k) As part of the Central Team, to provide, support and challenge to peers as they explore options for implementing their action plans.
- l) To continually enhance the reputation of the Academy within the Local Authority and beyond by building good networks of support and developing effective relationships.
- m) To maintain an up to date risk register for the academy;

2) General Management and Administration

- a) Through matrix management, support the Headteacher in the line management of the Office Manager, with distinct responsibility for the implementation of STEP Way and professional development of office staff. To support the Headteacher in the setting of objectives and manage performance of office staff.

- b) To provide liaison and support for the governors and trustees as required.
- c) In collaboration with Headteacher and others, promote the Academy with local businesses, the LA, external agencies and other institutions including developing and maintaining all the Academy's marketing & information materials and website.
- d) To recommend, establish and maintain computer-aided administration, which supports all the general work in the Academy, including statistical analysis ensuring that the pupil database and other pupil records are properly maintained and regularly updated.
- e) Timely completion of all statutory returns. To include but not limited to, Academy Census, Workforce Census, ESFA returns.
- f) To work with Headteachers to ensure that all relevant annual training, including, but not limited to, safeguarding, data protection and health and safety, are completed by all staff.
- g) To remain vigilant and to act responsibly to protect children and others from abuse of a physical, emotional, sexual, neglectful, financial or institutional nature, including a requirement to report any incidents that have been witnessed, heard or suspected.
- h) To undertake and follow safeguarding training, including safer recruitment and be responsible for ensuring that the single central record is up to date.

3) Admissions

To support the administration of admissions (STEP is the admissions authority) for the main school and where relevant, nursery, including adherence to the Academy's admission policy, giving information, where possible, to appropriate staff before the children begin. Ensuring that in-year admissions are conducted in a timely way to minimise the number of vacant places on the Academy roll.

4) Personnel and Human Resources Management

- a) Be responsible for ensuring procedures are followed precisely in relation to all personnel matters.
- b) Provide a confidential, effective and efficient personnel service to all staff in line with the Academy's adopted policies and procedures.
- c) Oversee the administration of all personnel matters including recruitment, retention, contracts of employment and payroll.
- d) Ensure that payroll is reviewed and reconciled and approved on a monthly basis.
- e) Oversee the maintenance of manual and computerised personnel records securely.

- f) Oversee the induction for newly appointed support staff and advice and guidance to existing staff on issues relating to their employment.
- g) Liaise with 'bought in' services e.g. Occupational Health, Payroll.

5) Finance and Accountancy

- a) To formulate short (one year) and long term (three to five year) budget strategies with agreed procedures which are reviewed annually and to prepare and present the annual budget for approval.
- b) To be responsible for all the financial accounts within the Academy; ensuring that all finance procedures are carried out in line with current regulations and STEP's policies and procedures.
- c) Closely monitor budgets to ensure effective use of resources within the devolved budget, providing regular reports of expenditure against budget to budget holders.
- d) Ensure that payroll is reviewed and reconciled and approved on a monthly basis.
- e) To assist with the preparation of STEP's end of year financial statement.
- f) To attend as invited all committee meetings.
- g) To ensure effective monitoring systems of income and expenditure are operated.
- h) obtaining comparative quotes, where appropriate, in order to receive best value for money. Having responsibility for ensuring the banking of monies, payment of invoices, chasing monies owed to the Academy, and payment of casual staff and overtime.
- i) To prepare bids for capital development projects, external funding possibilities and other grants.

6) Operational functions

- a) Work with the Head of Premises & Estates, Catering and ICT in the management and maintenance of the Academy with a focus on quality and where relevant, financial performance, to ensure that services are performing in line with the STEP Standard.
- b) To ensure, as far as is practicable, that the security of the site is maintained at all times and to make recommendations for improvement as necessary and is compliant with Safeguarding policies.
- c) Support the facilities and estate functions of the Academy to ensure as far as reasonably possible that:
 - it is managed to agreed quality criteria and within agreed budgets
 - KPIs are monitored, with performance challenged where necessary and where relevant, using management and influencing skills to ensure that performance meets the STEP Standard.

- an asset management plan is implemented and updated in line with agreed priorities
 - to lead on risk management, including ensuring that relevant risk assessments are completed and up to date
 - all sites, buildings and facilities are compliant with relevant legislation and procedures such as health & safety and child protection;
 - caretaking, cleaning, grounds maintenance and building maintenance programmes are fulfilled to the agreed quality standards by staff and contractors;
 - policies and procedures for contractors and supplier access to site and their management on site is aligned to child safeguarding policies.
- d) Support the catering function of the Academy to ensure as far as reasonably possible that:
- it is managed to agreed quality criteria and within agreed budgets
 - KPIs are monitored, with performance challenged where necessary and where relevant, using management and influencing skills to ensure that performance meets the STEP Standard.
 - In collaboration with Headteachers and Head Cooks, proactively engage with parents and children to improve/ maintain a high takeup of school meals.
 - To ensure that meal numbers are properly recorded and any dinner debt is pursued in line with relevant policies.
- e) Support the ICT function of the Academy to ensure as far as reasonably possible that:
- it is managed to agreed quality criteria and within agreed budgets
 - KPIs are monitored, with performance challenged where necessary and where relevant, using management and influencing skills to ensure that performance meets the STEP Standard.
 - The ICT plan is implemented within agreed budget, timescales and specification;
 - ICT systems including hardware, software and connectivity are effectively managed to limit malfunction and reduce the risk of mal-use by pupils, staff, volunteers, parents and other users;
- f) In conjunction with the Headteacher, lead the provision of extended school services to ensure that:
- it is managed to agreed quality criteria and within agreed budgets
 - all safeguarding and health and safety regulations are met
 - staff are trained in line with required guidelines
 - the provision is delivered in line with government guidelines (for example ratios are met)
 - income is recorded and collected and expenditure controlled
- g) To maintain a lettings policy for the Academy and explore avenues for letting premises and increasing income and to develop ways in which the Academy can be accessed for community use.
- h) Commission, procure and manage external services as required
- i) To undertake other related duties that may be required to meet the needs of the Academy.

7) Contract Management and Procurement

- a) In conjunction with the central finance team, to undertake negotiations with potential and existing suppliers to ensure the Academy obtains best value for all goods, services and works procured.

- b) To lead in the development of key performance indicators to manage all contractors.
- c) To lead in dispute resolution and rectification where contractor performance is not meeting standards.
- d) To ensure that the Academy adheres to the Procurement guidelines and that major procurement is communicated to the leadership team and governors.

8) Project Management

- a) To be responsible for all non-teaching projects (eg minor building works, ICT installations).
- b) To lead the development of project plans and proposals and communicate these effectively to staff and governors.
- c) To lead and manage the implementation of all phases of agreed projects, and operate effective management to ensure that issues are identified and resolved appropriately.

9) Communication and ICT

- a) In collaboration with the Headteacher, to oversee the content management of the Academy's website, ensuring that statutory requirements are published and up to date and staff have the correct training.
- b) To ensure that all office and premises staff contribute to professional and welcoming environment.
- c) Work with the Head of ICT to develop a sustainable, cost-effective ICT plan that supports both educational and operational objectives.
- d) To support the ICT functions to ensure:
 - ICT policies, procedures and systems are aligned with safeguarding policies and data protection policies and legislation;
- e) In collaboration with Headteachers, ensure that:
 - Communication is managed in line with the communication policy
 - The academy maintains a regular programme of stakeholder engagement through social media and newsletters
 - To support the office manager to develop and maintain a relationship with local press, through the regular sharing of positive news stories.

10) Income Generation

- a) Ensure that appropriate bids are made, according to requirements, for external funding.

- b) Ensure the Academy makes best use of its resources to maximise income generation through lettings.
- c) Take steps to maximise pupil numbers, through design and implementation of a pupil recruitment and marketing strategy.
- d) Maximise income from pupil premium and universal infant free school meals.

11) Effective use of resources

- a) Ensure effective use of resources at academy level, with a particular focus on non-payroll staffing and non-staffing costs.
- b) Review significant spend areas and benchmark internally.
- c) As part of multi-year planning, anticipate change of use of assets and/or resources, including staffing.
- d) Identify spending patterns within the academy in order to profile budget monitoring
- e) Identify areas of potential STEP wide collaborative procurement.
- f) Review supplier database to manage risk of fraud and secure value for money.
- g) Challenge approved supplier list for quality and service to ensure value for money.

12) Audit

- a) Ensure the completeness and accuracy of documentation for review by internal and external audit functions.
- b) Conduct peer-to-peer reviews.
- c) Support the smooth deliver of audit plans and deliverables.
- d) Ensure the appropriate and prompt implementation of recommendations provided, or resulting from, audit reviews.



POST: Associate Business Advisor

PERSON SPECIFICATION

Qualifications	Associate
Educated to a minimum of NVQ Level 4 in a relevant discipline/subject	Essential
Certificate or Diploma of School Business Management from the National College for School Leadership (NCSL)	Desirable
Accountancy qualification to a minimum of AAT technician stage	Desirable
Experience, Knowledge and Skills	
Experience of using computerised systems for budget planning, monitoring, management and the financial regulations applicable to Academies	Desirable
Experience of using information systems including computerised systems (SIMS / FMS6) in an administrative environment	Desirable
Experience of providing high-level administrative support including experience of managing staff	Desirable
Experience of developing and implementing a range of administrative and technical policies and procedures.	Desirable
Experience of analysing data, developing systems, problem solving and project management	Desirable
Experience of premises or site management including knowledge of the application of Health & Safety in a Academy/college setting, including good practice relevant to maintenance and upkeep of a public building and the carrying out of risk assessments	Desirable
Experience of constructing and writing bids for financial funding and an ability to successfully generate income.	Desirable
Knowledge of budget management and resource planning and a practical knowledge of different avenues of funding	Desirable
Ability to undertake a wide range of finance, personnel, premises and administrative tasks	Essential
Ability to analyse and interpret complex information, make recommendations, manage change and have an impact on future planning.	Desirable
Ability to collate statistical data and present in written reports	Essential
A good understanding of equal opportunities issues as they affect pupils and their families. Knowledge and understanding of the nature and effects of racial and economic disadvantage and inner city deprivation and the ability to develop appropriate responses to the needs arising. Knowledge and understanding of child protection and safeguarding	Essential
Proven literacy, numeracy and communication skills including being able to respond appropriately to staff, governors, pupils, outside agencies and the Local Authority	Essential
At least 2 years' experience of working as a Business Manager	Desirable
Personal attributes	

Ability to work successfully as a team member establishing effective working relationships and flexible working practices	Essential
Ability to work under pressure in a constantly changing and demanding environment and remain professional at all times.	Essential
Ability to communicate effectively and support staff appropriately	Essential
Physical ability to perform the duties of the post with the support of aids or adaptations as required.	Essential