

Bursteds Wood Primary School

Swanbridge Road
Bexleyheath
Kent
DA7 5BS



Tel: 020 8304 9960

E-mail: admin@burstedswood.school
Web: www.burstedswoodprimary.org.uk

Job Description

Post Title:	Business Manager and Chief Financial Officer of Bursteds Wood Primary School, a Single Academy Trust (3 FE)
Salary:	Minimum BEX18 / Maximum BEX20 – negotiable depending on experience and role coverage
Terms:	52 weeks a year, 36 hours a week but, as a senior leadership role, at times, more hours may be needed
Responsible to:	Principal
Important Internal Relationships:	Principal, Trustees, Teaching Staff, Associate Staff, Premises Team and (importantly) Pupils
Important External Relationships:	Parents, Visitors, DfE, Local Authority, Community Links, Contractors, Other Business Managers
Main Duties	To fulfil all roles of the Academy Business Manager and Chief Financial Officer as defined by the Academy Trust Handbook (October 2026 and onwards) and Academy Trusts Governance Guide (June 2026 and onwards). Documents are subject to change and the post holder would be expected to be compliant with the ongoing changes.

Main purpose of Job:

- To fulfil the role of CFO and Business Manager of the Academy
- Be a member of the Core Management Team (CMT) to assist the Principal in their duty to ensure that the Academy meets its educational aims and in their role as Accounting Officer
- Be jointly responsible (as delegated by the Principal) for providing professional leadership and management of Academy associate staff to enhance their effectiveness, in order to achieve improved standards of learning and achievement, including carrying out long-term resource planning and managing recruitment, appraisal and professional development
- Promote the highest standard of business ethos within the administrative function of the Academy and strategically ensure the most effective use of resources in associate of the Academy's learning objectives
- Be the Finance Manager with overall responsibility for the accounting and financial management of the Academy budget, including all income and outgoing apportionments, as well as advising on income streams not yet in place
- Under the direction of the Principal, lead on all financial matters in school, to ensure the school's successful financial performance and to ensure financial decisions are clearly linked to the school's strategic goals
- Lead, operate, maintain and develop the financial procedures and systems of the Academy ensuring that legal and safety requirements are met and that the Academy is fully compliant with DfE and audit requirements
- Oversee all contracts, SLAs and bids
- Implement school-wide changes and allocate resources in line with the Principal's School Development Plan, putting policies and procedures in place and communicating them to staff as required
- Continue to build on the implementation of a marketing plan for the Academy, which utilises the school website, signage, the prospectus, and communications with current and prospective parents/carers
- Monitor developments in technology and consider how it can be used to enhance the Academy's business processes, teaching and learning, and staff wellbeing
- Attend all CMT meetings as required and all Trustee meetings, reporting to the latter where appropriate within the Business Plan
- Provide administrative duties for the Trust Board and ensure compliance
- Ensure compliance with relevant government regulations, Education Acts, statutory instruments and Academy Article requirements as they affect the daily running of the Academy
- Ensure compliance with Health and Safety Legislation
- Ensure that the Academy website is compliant
- Act with oversight as onsite GDPR regulator, with statutory delegation for the role of GDPR Officer being outsourced
- Lead on IT infrastructure and advise the Principal with regards to procurement
- Contribute to the safeguarding and promotion of the welfare and personal care of children and young people with regard to the Academy Safeguarding and Child Protection Procedures
- Organise all events for the Academy, delegating to appropriate teams

Chief Financial Officer

The CFO continuously monitors the development of control systems meant to preserve the Academy's assets and reports accurate financial results and predictions

Overarching roles:

- Providing leadership
- Helping the development of both short-term and long-term strategic financial objectives
- Ensuring the credibility of the Academy finances
- Providing accurate budget analyses on time, together with financial trends and forecasts
- Implementing, developing and maintaining an all-encompassing job cost system across the Academy's obligatory and vision-based priorities
- Directing, overseeing all aspects of Finance and Accounting, and enhancing the overall financial performance
- Evaluating long-term plans and introducing new programmes and strategies
- Offering financial advice to the chief executive officer
- Managing financial forecasting processes and budgets
- Ensure the effective and efficient operation of the Finance Team, delegating tasks to finance/office staff where appropriate
- Reporting to the Board and providing recommendations regarding business opportunities
- Ensuring that the appropriate internal controls are in place
- Ensuring compliance with ATH and DfE

CFO Personal Skills

- Strong interpersonal skills and communication skills
- Strong problem-solving Skills.
- Strong leadership and management skills
- Strong team building skills
- Strong field knowledge with extensive knowledge of finances in Academy schools and adherence to the Academy Trusts Handbook

Business Manager**Strategic Financial Planning**

- In collaboration with the Principal, prepare the Academy's budget and provide the Trustees and Principal with financial advice, guidance and support
- Fulfil the duties of the Company Secretary
- Prepare agenda and related documentation and attend Trustee and Committee Meetings
- Maintain governance documentation (in relation to all roles)
- Prepare annual estimates of income and expenditure for approval of the Trustees
- Prepare the annual budget, maintaining professional standards of accounting
- Ensure value for money
- Ensure the planning, delivery and development of financial and accounting services within the Academy

- Advise the Trustees and Principal on the resourcing needs of the Academy within present and future financial limits, as well as the cost of new initiatives and the scope for efficiencies
- Prepare monitoring reports monthly (shared with relevant Trustees and the Principal) and the annual financial statements
- Prepare, implement, monitor and review the Trustees Financial Manual
- Lead on the preparation, implementation and review of the risk register
- Review policies and procedures within remit
- Investigate various sources of funding
- Ensure the effective use of resources and prepare information for capital projects
- Ensure the accounts are used as a mechanism for informing the wider process of the budgetary cycle of consultation, decision making, monitoring and review
- Produce reports for stakeholders, Trustees and Committees

Day-to-day Financial Management

- Implement DfE accounting requirements and complete all budget returns on time
- Implement the new budget at the beginning of the financial year onto the budgeting software, ensuring balances agree with budget agreed by Trustees
- Prepare Finance Report and Academy Monthly Accounting Routine Checklist for the Principal and Trustees.
- Complete month end reconciliation and VAT return and carry out cash flow process
- Work with the Auditor during regular audit inspections, submit accurate records for analysis and be prepared to discuss and explain all entries; carry out all journals as requested
- Prepare and maintain Counter Party and Related Party report for audit
- Prepare year end accounts for audit
- As Company Secretary, maintain and update Trustee details for Company House GIAS and submit the end of year return
- Organise regular visits by the internal auditor as required
- Manage and update FMS6 package
- Check payslips and process salary transactions
- Implement BACS runs as required
- Process monthly VAT submission to HMRC
- Process monthly direct debits and ensure adequate authorisation
- Liaise with SENCo to budget for SEN top up payments and invoice the LA as necessary
- Process INSET requests and oversee catering for INSET days
- Send out invoices, pay cash, cheques into bank and allocate to relevant cost centres
- Carry out benchmarking process on a regular basis
- Process all cheque payments
- Liaise with insurers regarding claims
- Oversee the work of the Office, Canteen, Cleaners and Premises Office

- Set a good example in terms of personal presentation, attendance and punctuality

Administration

- Oversee the Office Manager
- Oversee all HR policies and Procedures in the Academy and lead on the Academy HR practices, including the SCR
- Oversee payroll
- Oversee recruitment, interviewing where appropriate
- Keep records in accordance with the school's record retention schedule and UK data protection law, ensuring information security and confidentiality at all times

Grounds/Buildings

- Oversee the Premises Managers to ensure a safe, secure, clean and well maintained site
- Monitor gas and electric meter readings and arrange energy efficiency certificate
- Ensure all regular health and safety tests and checks are carried out in liaison with Premises Managers
- Process payments and adherence to terms and conditions for lettings

Procurement, Contractors and Bids

- Prepare specifications and information relevant to tendering for contracts (including IT and grounds maintenance) and relevant to capital works such as CIF bids
- Obtain necessary quotations for contracts, building works and relevant projects
- Complete relevant returns
- Work with premises staff and outside contractors to ensure the good order and maintenance of the buildings, equipment and site
- Liaise with the Premises Managers in arranging the schedule for any building works
- Diarise and lead Health & Safety meetings and work with Premises Managers to ensure problems are solved

Facility and Property Management – undertaking the roles of management, co-ordination, monitoring and evaluating

- Line Manage the Premises Team
- Ensure the supervision of relevant planning and construction processes is undertaken in line with contractual obligations
- Ensure the safe maintenance and security operation of the entire Academy site
- Manage the maintenance of the Academy's site including the purchase and repair of all furniture and fittings
- Ensure the continuing availability utilities, site services and equipment
- Follow sound practices in estate management and grounds maintenance
- Monitor, assess and review contractual obligations for outsourced Academy services
- Ensure a safe environment for the stakeholders of the Academy 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 Academy premises to external organization as required.

- Seek professional advice on insurance and advise the CMT / Trustees on appropriate insurances for the Academy and implement and manage such schemes accordingly
- Liaise with appropriate external agencies to secure bids

IT

- Lead on IT infrastructure and systems including data reporting systems
- Lead on the school website
- Lead on establishing, monitoring and reviewing the online learning platform(s) for staff and pupils

GDPR

- Act as lead professional within the school on all aspects of GDPR and compliance to the ICO
- Arrange annual payment to ensure the school remains on the ICO register
- Engage with and liaise with the outsourced delegated DPO service, to ensure that information is shared in a timely and effective way, enabling them to fulfil their duty
- Respond to Subject Access Requests / Freedom of Information Requests in house as needed, in liaison with the DPO service

Health and Safety – undertaking the roles of leading, co-ordinating, monitoring, evaluating

- Act as the Academy's Health and Safety co-ordinator and Fire Officer
- Ensure the Academy's written health and safety policy statement is clearly communicated and available to all people
- Ensure the health and safety policy is implemented all times, put into practice and is subject to review and assessment at regular intervals or as situation change
- Enable regular consultation with people on health and safety issues
- Ensure systems are in place to enable the identification of hazards and risk assessments including fire safety
- Lead on audits as required
- Ensure systems are in place for effective monitoring, measuring and reporting of health and safety issues to the Senior Team, Trustees and where appropriate and Health and Safety Executive
- Ensure the maximum level of security consistent with the ethos of the Academy
- Oversee statutory obligations are being met for pupils with special educational needs, ensuring that financial and associating agency services are adequate for their diverse needs
- Organise and, where relevant, deliver statutory training to staff in aspect relating to this role

Governance (in addition to CFO role)

- Support the School and Trust in continuing to be fully compliant with all governance expectations, especially those as detailed with the Academy Trust Handbook.
- Act as Company Secretary ensuring all filings and records are made to Companies House and DfE and ensuring the website is up to date
- Work closely with the Governance Professional service and Trustees

- Maintain and update governance paperwork annually including reference documents and risk register
- Provide information, support and attend all Trustee meetings and act on outcomes of meetings
- Maintain a training log of all Trustee training and contribute to the training programme
- Maintain an attendance list for Trustees and publish on the website and for Full Board Agenda review
- Support recruitment of Trustees and Members
- This list is not exhaustive and will evolve working closely with the Chair and Vice Chair

OTHER RESPONSIBILITIES

Any other duties which may be reasonably required to ensure an effective service in the Academy.

This job description will be reviewed annually as part of your Appraisal Meeting and may be subject to amendment or modification at any time after consultation with the post holder. It is not a comprehensive statement of procedures and tasks but sets out the main expectations of the Academy in relation to the post holder's professional responsibilities and duties. Postholders are expected to undertake other duties and responsibilities relevant to the nature, level and scope of the post and the grade has been established on this basis.