



Bursar – Job Description

Finance and Administration

In consultation with the Principal, preparing the School's Business Plans, presenting them to the Governors, and working with the Principal to implement the plans when they have been approved by the Governors.

In consultation with the Principal:-

- i) allocating, controlling and accounting for the financial and material resources of the School in accordance with the policies of the Governors;
- ii) arranging for the safety and security and effective maintenance of the assets of the School in accordance with the requirements of the Governors and, where applicable, the Charity Commissioners;
- iii) ensuring that proper books of account (including income and expenditure accounts and balance sheets) are kept and that reports of the material and financial affairs of the school are produced to the Governors in accordance with their requirements and with the requirements of the law.

Without prejudice to the generality of the above, you shall be responsible for:-

- i) advising the Governors on general financial policy;
- ii) keeping the Principal informed, through regular informal and formal communication, about all aspects of the School's financial performance;
- iii) preparing annual estimates of income and expenditure;
- iv) preparing annual budgets for departments within the School, in consultation with the Principal;
- v) monitoring income and expenditure in relation to budget and presenting regular management reports on them;

- vi) keeping the accounts of the School and preparing Statements of Financial Activity (SOFA) and balance sheets in accordance with the Charities' Statement of Recommended Practice (SORP);
- vii) maintaining cash flow projections for the current and future years;
- viii) undertaking financial modelling, sensitivity analysis and bench-marking performance on financial items;
- ix) undertaking long term financial planning to include the three- to five-year Capital Expenditure programme and any further expansion;
- x) preparing forecasts for the future financial performance of the School, usually over a period of five years;
- xi) advising on investments in consultation with the School's brokers or investment managers;
- xii) preparing the pupils' invoices and collecting all fees and other dues, keeping the Principal informed of any unpaid bills and taking appropriate action to remedy this;
- xiii) the payment of all salaries and wages, including PAYE, superannuation and National Insurance;
- xiv) having overall responsibility for the purchasing of all goods and services;
- xv) scrutinising and passing for payment all invoices and statements of account;
- xvi) organising special appeals for capital funds;
- xvii) keeping analyses of costs and other statistical records;
- xviii) preparing long-term assessments of future financial performance of the School;
- xix) preparing financial appraisals of particular projects;
- xx) advising on taxation, including income and corporation tax, development land tax, capital gains tax, capital transfer tax, Value Added Tax and any other relevant tax;
- xxi) advising on the financial implications of the charitable status of the School;
- xxii) dealing with the School's income tax and rating assessments;
- xxiii) administering pension schemes for teaching and other staff;
- xxiv) administering any contracts which the School may have, including catering, coach companies, maintenance and cleaning; reviewing these and ensuring, that these meet the School's current needs;
- xxv) manage the relationship with the School's auditors including provision of relevant accounting and other records during the annual audit;
- xxvi) overseeing and implementing the School's policy to comply with the requirements of Health and Safety legislation, with the assistance of professionals as required;
- xxvii) the operation of a composition fees scheme; advising on bursary and scholarship funds and undertaking assessments of parents' income and assets to assist the Principal in making or renewing bursary awards; liaison with Bursary Administration Limited for the management of 11+ bursary applications;

- xxviii) maintaining personal files and records of all staff with regard to financial matters;
- xxix) the leasing of any facilities needed by the School, including storage space, theatres and sporting facilities;
- xxx) arrangements for the organisation and running of the School buses.

You shall have regard to any matters affecting or pertaining to the legal position, duties or liabilities of the School (except those regarding the education of pupils).

You shall be responsible for:-

- i) buying, directly or indirectly, the principal commodities for consumption and use;
- ii) acting as correspondent for the Department for Education, (DFE) and being responsible for the records and returns required by the DFE and also ISC;
- iii) maintaining contact with the statutory authorities and with other organisations; and
- iv) supervising the School's insurance in all its forms.

You shall carry out such other reasonable financial and/or administrative tasks as shall be stipulated from time to time by the Principal and the Governors.

You shall act as Clerk to the Governors and as Secretary to the Governors' sub-committees.

School Buildings, Grounds and General Duties

Your duties shall include assisting the Principal and other staff, as directed by her, on the following: -

- i) The maintenance of the School buildings;
- ii) Awareness of potential party wall issues and the supervision of any party wall agreements which may be in force from time to time;
- iii) The security of the School buildings;
- iv) The installation and maintenance of equipment for protection against and escape from fire;
- v) The maintenance and efficiency of the installations and plant for electric supply, heating, domestic hot water, cooking, water-softening, etc.;
- vi) The supervision of the lighting and ventilation of the School buildings;

- vii) The production of outline specifications for new buildings, obtaining tenders, planning permission, liaison with architects;
- viii) Letting of premises to outside organisations;
- ix) Leasing of additional facilities for the School.

Staff

Your duties shall include -

- i) Assisting the Principal with the selection and appointment of staff for your office and other non-teaching staff as requested by her;
- ii) The deployment and management of the staff directly employed in your office and the allocation of duties to them. You should also undertake the appraisal of the performance of these staff and offer advice and training appropriate to their needs and in accordance with School policies;
- iii) The provision of information, following approval by the Principal, about the work and performance of the staff employed in your office where this is relevant to their future employment.

General

To undertake any duties which fall within your job description or any other duties which may reasonably be required of you by the Governors according to the normal practice of an independent school.

Where this is appropriate or where requested to do so, to consult with the Principal and the Governors on any matter affecting your duties.

To comply with all reasonable and lawful directions given to you by the Principal and/or Governors.

Promptly to make such reports to the Principal and/or Governors in connection with the affairs of the School on such matters and at such times as are reasonably required.

To report your own wrongdoing and any wrongdoing of any other employee of the School you become aware of to the Principal and/or Governors.

To use your best endeavours to promote, protect, develop and extend the activities, interests and good reputation of the School.

To advise and assist the Governors and the Principal of the School in the exercise of their functions.

To attend meetings of the Governors, at their invitation, and make such reports to them (both orally and in writing) in connection with the discharge of your duties as the Governors may require.

To exercise such powers and perform such duties and observe such restrictions as may from time to time be assigned to you by or under the authority of the Governors.

To assist the Principal with the Principal's responsibilities for the day-to-day management of the School.

Well and faithfully to serve the School.

Professional Duties

Your professional duties shall be carried out in accordance with and subject to:-

- i) any statute governing the conduct of or applying to the School's business or affairs;
- ii) any orders and regulations having effect under those statutes;
- iii) the articles of government of the School, to the extent to which their content is prescribed by statute;
- iv) any articles of association of the School;
- v) the provision of any trust deed applying to the School;

and, to the extent to which they are not inconsistent with the above conditions:-

- i) the articles of government of the School where they are not prescribed by statute;
- ii) the provisions of any charter by which the School is incorporated
- iii) any rules, regulations or policies, directions or restrictions laid down by the Governors; and
- iv) the terms of your employment.

Professional Development

You shall participate in arrangements for your appraisal and in the identification of areas in which you would benefit from training, and shall undergo such training.

You should keep abreast of developments in the administration of schools and, wherever possible, attend the ISBA annual meeting, regional meetings and professional development courses either arranged by ISBA or other providers.

NOTES

1. This job description allocates duties and responsibilities but does not direct the particular amount of time to be spent on carrying them out.
2. This job description is not necessarily a comprehensive definition of the post. It will be reviewed annually and it may be subject to modification or amendment at any time after consultation with the post holder.
3. You are responsible for exercising care in relation to yourself and those who may be affected by your actions with regard to Health and Safety. Please read the fire notices and if the fire alarm sounds, follow these instructions or any instructions which may be given at that time. Please also be aware of procedures in the case of lockdown.

Benefits

Competitive salary in line with qualifications and experience, expected to be in the region of £90,000-£100,000pa FTE.

25 days' holiday per year, plus statutory holidays.

Updated – August 2025