George Heriot’s School
Founded 1628

APPOINTMENT OF BURSAR

OCTOBER 2018

Saxton Bampfylde
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Introduction

The Governors and Principal of our highly successful school seek to appoint a new Bursar to succeed Mrs Jennifer Alexander. Heriot’s is one of Scotland’s foremost schools, steeped in history and tradition. Dating back over 350 years, the School has an enviable reputation for its high academic standards, supportive pastoral care and its extra-curricular life. It is a place where children flourish and are happy.

Attractively located in its own grounds in the centre of Edinburgh, the School is a mixture of original and new buildings including the outstanding Centre for Sport and Exercise which opened in 2012.

The Bursar reports to the Principal and He/She is also accountable to the governing body, via the Chair of Governors, for the effective conduct of financial affairs, sound business management and administration, and the material state of the premises. He/She also takes a leading role in strategy creation and implementation on topics ranging from capital projects to bursary funding.

This pack outlines further details about the School, the opportunity and the role. It also includes details of how to apply and the terms of the appointment.

For further information about the School, please visit the School’s website at www.george-heriots.com.
Our Heritage

In 1624 George Heriot, jeweller and banker to King James VI and I, left his fortune in Trust to provide for a hospital for the “maintenance, relief, bringing up and education of Puire fatherless bairnes friemens sones of the Towne of Edinburgh”.

The Main Building was constructed during the period from 1628 to 1650 and the School admitted its first pupils in 1659, providing residential education initially to 30 boys, growing to around 300. In 1886 it became a fee paying day school for over 1000 pupils, admitted girls for the first time in 1979, becoming fully independent shortly thereafter.

Throughout this period it provided free education for “fatherless bairnes” and today the Foundation - which now also supports the children of widowers - continues to be at the very core of the School. George Heriot's Trust is one of Scotland’s oldest charities and the philanthropic ethos of its founder is reflected in many of the activities within the School. Heriot's was one of the first independent schools to be successfully reviewed by the Office of the Scottish Charity Regulator (OSCR).
Our School

Heriot’s has long been regarded as one of Scotland’s leading schools. Today the School flourishes as an independent co-educational day school catering for 1645 pupils from Nursery to Sixth Year, aged 4 to 18. Our emphasis is on developing each child's potential in a happy, caring and stimulating environment.

Heriot’s has a distinctive whole school character with Junior and Senior Schools situated on one campus and dynamic interaction between the two. Heriot’s Junior School and Senior School are highly successful primary and secondary schools in their own right, each led by its own Head of School (Headteacher), and they provide a pro-active, innovative approach to education for their respective age groups. At the same time, each is enriched by its close relationship with the other and the many ways in which they share the purposes, ethos and activities of Heriot’s as a whole. Above all this gives Heriot’s a family atmosphere and strong sense of community.

“\textit{A progressive and modern school and teaching ethos, balanced with tradition}”

\textit{Current Parent}

The Junior School comprises 617 pupils. There is Wrap Around Care provision 50 weeks of the year for Junior School children, after school in term time and for full days during holiday periods.

The Senior School comprises 1031 pupils. There are 18 subject teaching Departments. Of these, a number provide specialist subject teaching in the Middle and Upper Primary sections of the Junior School, while the Music and Physical Education Departments, together with Support for Learning, and serve the whole school.

Demand for places is high at every intake point and the School is full.
The Foundation

The Foundation is the charitable core of Heriot's and makes the School unique. Sixty six members of the pupil body at Heriot's are Foundationers - Edinburgh children who have been bereaved of a parent. They do not pay any fees and are fully supported with enhanced pastoral care throughout their time in school. Foundation places are means tested to ensure we support families in substantial financial need.

The Foundation costs Herriot's over £850,000 every year to fund and nearly all of that is funded out of school fee income. As part of the Strategic Plan the Trust is committed to building a financial bedrock for the Foundation. In November 2015 Heriot's launched Foundation400 - our first major fundraising campaign - to secure the future of the Foundation.

The ambition of the Foundation400 Campaign is to raise £15 million to endow the Foundation before the School's 400th Anniversary in 2059. This will secure the Foundation in perpetuity and allow all fee income to be invested in the School.

“'A school that is approachable, not elitist’”

Former Parent

Currently we have 66 pupils being educated through the Foundation and 49 pupils supported by Bursaries from George Heriot's Trust – 8.1% of the School roll. We also provide a small number of merit based Academic and Expressive Arts Scholarships to new and existing pupils in the Senior School.
Our pupils

At Heriot's we have high expectations of our young people – we want them to work hard, look smart, be polite to everyone and care about each other. We take pride in our reputation throughout the city. And our parents do too. Outside the classroom our enthusiastic team of staff offers over a hundred activities so every child can find a place to flourish, a team to join and another friendship group. We like our trophies - regional, national and international –but the main thing is about taking part and being happy. We are proud of our exam results, of every child's achievement. Right from the start, our children are encouraged to read widely, discuss ideas and think for themselves, the real basis of confidence and scholarship. Participation is at the heart of everything we do; our range of sports, musical activities and drama events, are unparalleled and the success and excellence of our teams and individuals are a constant source of pleasure. Our boys and girls leave school ready for the next stage of their lives – confident but not conceited; socially aware; and ready to study and to work. They love their School.

Our results in the external examinations have been consistently outstanding over recent years:

**S5 HIGHER RESULTS 9 YEAR TREND A-C passes**

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**PRESENTATION RATES**

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We are not complacent and the culture of pro-active continuous improvement is an important part of George Heriot's.

Our Staff

Our parents constantly comment on the warmth of the relationship between teachers and pupils at Heriot’s. Our staff are passionate about teaching and so our children like to learn. In the classroom and beyond, our staff share their expertise with kindness and humour.

We have 180 full time and 24 part time teaching professionals - 45 in the Junior School and 135 in the Senior School (although many of the Senior School teachers also teach specialist subjects in the Junior School). In addition we have 195 staff working in a variety of non-teaching areas, supplemented by additional members of staff at various times during the year for sports coaching and invigilation, who together support the learning and teaching within the School. Our staff take pride in working for Heriot’s and their loyalty and commitment are reflected in our low turnover rates and longevity of service.

Governance and Management

The Board of Governors of George Heriot's Trust has responsibility for the implementation of the charitable purposes - that is the provision of the Foundation and the establishment and operation of the School; for setting and reviewing the overall strategic direction for Heriot's; and for providing support and oversight of the operation of the School.

Based on the School’s 10 year Strategic Plan the SMT prepares and regularly monitors an annual Whole School Improvement Plan detailing matters to be delivered during the year.

Our Location and Facilities

The School is attractively situated in its own grounds close to the city centre and within easy walking distance of bus and rail terminals. A number of bus routes also service the School. Edinburgh Castle forms a magnificent backdrop and Edinburgh’s financial centre, the University of Edinburgh, the College of Art, the National Library and the Royal Scottish Museum are located close by. The original building has been carefully preserved and, as an historic monument, is open at certain times to the public during school holidays. Over the years, a succession of new buildings and the upgrading of existing buildings...
have provided the full complement of educational facilities. The School also has extensive Sports fields and facilities at Goldenacre, a short journey from the main campus, and a boathouse on the Union Canal. In 2005 Heriot's acquired the adjacent Grassmarket Campus of the Edinburgh College of Art. A long-term plan for the development of the whole school campus, incorporating the Grassmarket Campus, is in place. The first phase of this plan has now been completed, and the award-winning Heriot's Centre for Sport and Exercise opened in March 2012.

All classrooms in the school are well provisioned with PCs, laptops, iPads, Wi-Fi, projectors, smartboards and visualisers. We provide additional PCs and iPads for pupil use in the Junior school classrooms, along with timetabled lessons in dedicated ICT facilities. We have recently installed 5 interactive displays in the Junior school with a view to expanding this into all Junior school classrooms later in the year, subject to a successful trial. In the Senior school, numerous departments are equipped with ICT labs and we provide class sets of Wi-Fi laptops along with shared ICT labs in order to enhance learning and teaching across all departments. S5 and S6 pupils are able to use their own mobile device to connect to Office 365 cloud based storage and the Internet using the school's Wi-Fi network, in all classrooms and study areas within the school. The school's storage area network and virtualised server environment have recently been upgraded in order to provide a robust and reliable ICT infrastructure for pupils and staff.

The school communicates with parents using the Clarioncall email system and uses ParentPay to collect secure online payments.
The Role

Duties and Responsibilities:

Whole School Management

- To be a member of and play a full part in the work of the School Management Team (SMT), which is chaired by the Principal;
- To work closely with the Principal and other members of the SMT with particular regard to financial, Trust/Governance and operational matters within the Bursar remit and to provide all necessary input and support to colleagues. Key areas of collaboration include:
  - Strategic financial planning with Governors, the Principal, and senior managers; responsible for major staffing and/or infrastructure budgets and/or other key areas of income and/or expenditure;
  - Preparation of annual budget proposals to Governors including a recommendation to Governors on the annual setting of school fees;
  - Advising the Admissions Office and Governors on applications for means tested assistance with fees (Foundation awards, James Hardie Bursaries, other bursaries) with regard to financial and other non-academic criteria;
  - Dealing with parents/guardians who encounter difficulties with fees.

Financial Management

- To assume overall responsibility for all day to day operations of the Finance Department, to lead the finance team through effective deployment, management and motivation, and to ensure the efficient performance of the duties carried out by the Office.
- To ensure effective communications and collaboration between the Finance Department and all other departments within the School's organisation.
- To take overall responsibility for: all central procedures relating to the School's financial management, implementation of financial controls, supporting internal budget holders, ensuring Tax and VAT compliance, insurance, and supporting the Investment Committee in managing the Trust's portfolio.

Estates, Infrastructure and Operations

- To share responsibility, with the Principal, for the effective management, maintenance and improvement of the Trust's buildings and grounds;
- To work with the Governors and Principal in respect of infrastructure projects;
- To work closely with (and ensure effective liaison with) the Director of ICT in respect of all IT related hardware projects.
Commercial Activities

• To support the Principal and Governors in the development of a strategy for commercial activities;
• To implement, manage and promote the agreed strategy for the Trust’s commercial activities via Heriot Enterprises Limited and The Heriot’s Centre for Sport and Exercise (HCSE);
• To act as company secretary, and to manage, the school’s two wholly owned subsidiary companies HCSE and Heriot’s Enterprise;
• To be a Director with executive responsibility of HCSE.

George Heriot’s Trust

• Act as Treasurer of George Heriot’s Trust and Secretary to the Governing Body;
• Provide administrative and secretarial support for all activities of the Governing Body, including:
  o Arrangements for all meetings of the Board and its sub-committees
  o The preparation of agendas, papers and reports prior to meetings, and the production of minutes for each meeting;
  o Legal matters – liaising with the School’s legal advisors on all legal matters;
  o Data Protection – acting as the Trust’s Data Protection Officer and ensuring all policies are in place and (in conjunction with SMT) complied with;
  o Risk register – maintaining a central risk register for the George Heriot’s Trust and School.

Support Staff management and HR

• To oversee the management of those support staff who are included in the Bursar’s remit.
  Chairing meetings of the Bursarial and Support Leadership Team;
• To assist the HR manager in ensuring that all acts and procedures in the name of the Governors as employers conform to the requirements of employment law.

Health and Safety

• To provide advice and input on the formulation, review and implementation of the Trust’s Health and Safety Policy and Procedures;
• To line manage and support the Health and Safety Adviser/ Competent Person.

Catering

• To liaise with the Catering Manager regarding financial control and reporting in relation to catering.
Person Specification

Personal Attributes

• Committed to George Heriot's School and to the encouragement of responsibility, the desire for excellence and the love of learning upon which the school is founded;
• An understanding of the needs and challenges facing independent education;
• The ability to lead by example and the gravitas, integrity and personal impact needed to command respect from a wide range of internal and external stakeholders;
• A sharp mind which can see both the big picture and the small detail, brings clarity and structure to discussions, and has a focus on purpose, quality, efficiency and efficacy;
• An open, collegial, leadership style with the ability to build strong relationships with all colleagues based on common values and goals. Where appropriate, lightness of touch and humour;
• Collaborative and decisive;
• Sets high standards;
• Fluent and accurate written and spoken English; excellent oral and written communication skills and strong presentation skills;
• A demonstrable capacity to contribute strategically to the wider development of an organisation whilst simultaneously retaining a strong grasp of operational detail;
• Dedicated to safeguarding and promoting the welfare of children and young people; a satisfactory Enhanced Disclosure from the DBS.

Experience

• A proven track record of leadership, including the effective management of staff, the efficient operation of high quality services, and the successful management of projects;
• A fulsome knowledge of financial management, ideally with a professional qualification, and experience of budgeting, forecasting, and strategic business planning;
• Experience of operational complexity and budgeting;
• Experience of leading and managing staff in differing disciplines who vary in their levels of experience and qualification.
Terms of Appointment

The successful applicant will take up the appointment in April 2019

The Governors will offer an appropriate and competitive remuneration package to the successful candidate reflecting the standing of the role. Partial fee remission is generally offered to all staff with children at Heriot's (with the exception of the Nursery), subject to the availability of a place.

Heriot's is an Equal Opportunities employer and we welcome applications from all sections of the community.

We are committed to safeguarding the welfare of children and the appointment will be subject to membership of the PVG Scheme. The appointment will also be subject to satisfactory references.

The Process

It is anticipated that following a review of applications on November 8th, selected candidates will be invited to attend a first stage interview in the following fortnight. Candidates not being taken forward will also be notified.

Following first stage interviews, a short list of candidates will be invited for second stage interviews in December. A selection will then be made and an opportunity provided for final stage candidates to tour the school and to meet some further members of the School Management Team.

Written references will be taken up at this point in the process, but not without prior discussion with candidates.
How to apply

Saxton Bampfylde Ltd is acting as an employment agency advisor to George Heriot’s on this appointment. Candidates should apply for this role through our website at www.saxbam.com/appointments using code FAYKC. Candidates should submit a covering letter, a CV and the equal opportunities monitoring form*. This can be downloaded from Saxton Bampfylde’s website.

Your letter should be addressed to Mrs Lesley Franklin. It must be no more than two pages in length and should summarise the following:

- your proven ability relevant to the person and job specifications
- why you are attracted to the role
- how your experiences as an educator have shaped your vision for a school

The closing date for applications is noon on Monday November 5th.

We would be grateful if you could inform us, in your application, of any difficulties with the dates of the interview process.

*The equal opportunities monitoring form will not be shared with anyone involved in assessing your application.