

# Appointment brief

## Appointment of Bursar

October 2023

Reference: FBKSA



# An introduction from our Head



Finton House School holds a special place in the hearts of all those who have been here, either as a pupil, a parent or as a member of staff. It is a unique school combining a warm child centric environment with a high focus on wellbeing and values while also achieving outstanding academic results. This is in the context of a non-selective entry, increasingly rare for Prep schools in the area, and a specific objective to include children with special education needs who can thrive in a mainstream environment. Inclusion is part of the fabric of Finton House, together with a focus on building an understanding of our roles in the Community around us and our duty to contribute. All this is down to the culture, care and commitment of our highly experienced staff who get the best out of every child from those that need early support in specific areas to the more able who should be stretched.

Working here is deeply rewarding and often a great deal of fun - after all, happiness is the key to a successful education. Everyone works hard to maintain the School's success and outstanding reputation, while in the knowledge that protection of their own wellbeing is taken very seriously.

**Ben Freeman, Headteacher**

# Our difference

Finton House School is a non-selective independent co-educational preparatory school for up to 340 children aged 4 - 11 years. The Lower School is the children in Reception and Year 1, the Middle School is Year 2 and 3 and the Upper School is the children from Year 4 to Year 6 (age 8-11). At Finton House everyone feels safe, happy and valued; boys and girls of all abilities, including the most able and those with special educational needs are nurtured and challenged to make excellent personal and academic progress. The education is broad, embracing technology as well as using the outdoors, allowing children to discover their own strengths and passions.

Central to the philosophy of the School is our belief in the need to teach the children as individuals. Finton House has a strong policy of inclusion and there are a number of children with specific special needs e.g. Autistic Spectrum Disorder, Visual Impairment, Hearing Impairment, Speech and Language Disorder, Dyslexia or Dyspraxia, as well as other disabilities/learning difficulties.

# Our buildings

The main building is made up of two Victorian villas with a bridge building in between. In 2004 a separate 3 classroom block was opened which houses the Reception classes and in 2013, a basement building under the playground opened which accommodates Design & Technology, Science and Music rooms. The School has a fifty-year lease on Trinity Fields, high quality grass pitches that are two minutes-walk from the School.





# The role

## **PURPOSE OF POST**

The Bursar's purpose is to partner the Head and support the Governors in the School's strategic development plan, and to support the educational aims of the School through the effective management of the School's resources and facilities. This includes responsibility for oversight of all non-teaching support services of the School, such as Finance, Estates, HR, IT, Legal, Company Secretarial, Services (e.g. catering, cleaning, catering and transport), Regulatory Compliance (including Single Central Register and health and safety).

## **KEY ACCOUNTABILITIES**

The Bursar's role is wide ranging, stimulating and challenging. It is impossible to draft a complete and exhaustive list of duties and responsibilities and a key attribute of a successful Bursar is to plan for the longer term whilst always retaining a preparedness for the unexpected. Key duties will be as follows:

### **Finance**

- Produce management accounts, budgets, forecasts and assessment of strategic options;
- Run the School's financial affairs in a cost-conscious and efficient manner;
- Liaise with the Governors, in particular the Finance and General Purposes Committee, to develop and implement the School's financial strategy;
- Plan and deliver all capital projects from a financial and operational perspective;
- Be responsible for fee billing and collection, staff payroll, cost control and management of pension provision;
- Manage an effective internal controls framework to ensure accurate accounting records, stewardship of assets, and tight management of liabilities and expenses;
- In liaison with the Head, recommend appropriate fees and staff remuneration to the Governors;
- Be responsible for financial implications of the School's activities on its charitable status (recognising changing criteria);

- Liaise with fund-raising committees in the planning of charitable events, ensuring the School participates in a meaningful but measured way;
- Manage the financial aspects of the School's development and philanthropy activities, ensuring funds are correctly allocated, pledges are completed and gift aid is claimed. Where suitable, participate in development and philanthropy functions as a representative of the School;
- Lead the process of assessment of parents' income and assets prior to making bursary awards;
- Monitor and manage, with oversight from the Finance & General Purposes Committee, the charity reserves, including the bursary and partnership funds held by our investment managers.

### **Buildings, Estates and Grounds**

- Ensure the School operates efficiently, effectively and safely, making best use of the facilities;
- Oversee the School's contracted services ensuring a high quality of service (presently cleaning and catering);
- Oversee site staff and any external suppliers in a timely and cost effective manner;
- Identify, scope and source services to manage a wide range of minor repair works and major refurbishment projects as well as planning any future construction work;
- Liaise with the Trustees and staff of Trinity Fields Trust (TFT) to ensure good relations are maintained and TFT comply with the conditions of the School's Agreement;
- Manage the School's IT infrastructure and external IT contractors.

### **General Management and Administration**

- Lead effective procurement of all services and products required by the School;
- Work with the Head to ensure compliance with all aspects of employment law;
- Manage the Single Central Register, ensuring it is fully compliant at all times;
- Manage the School's HR processes including staying current with legislation, supporting SLT members in recruitment;
- Ensure compliance with Health and Safety legislation, including the completion of risk assessments;
- Ensure the School has adequate insurance cover at all times to include employer's liability, buildings and equipment cover, personal accident, travel insurance and other relevant cover;
- Be responsible for key school policies, ensuring they are updated in a timely manner and in line with legislation including inspection;
- Maintain positive working relationships with the School's professional advisors, tending services per the procurement policies of the School;
- Act as the School's Data Protection Officer.

### **Company Secretary**

- Agree, attend and schedule dates for Board and Finance & General Purposes Committee meetings;
- Liaise with Governors as necessary in relation to induction and training;
- Maintain and review the School's Business Risk Register, proactively managing the risks of the School.
- Complete all reports and submissions to Companies House and the Charities Commission;
- Monitor adherence to all Charities Commission requirements;
- Liaise with the Clerk to the Board, in particular in agreeing and circulating agendas, Board packs and minutes of Board and Finance & General Purposes Committee Meetings.

# Person Specification

The successful candidate will be a dynamic and communicative leader, capable of winning trust, and will bring the following range of skills and experience:

## QUALIFICATIONS

- An excellent level of education;
- An accounting qualification or qualification in a relevant subject area would be desirable;
- Professional accreditation in Health & Safety, Marketing, Management or others would be desirable.

## EXPERIENCE

- A clear record in supporting strategic decision making at board level or senior leadership level;
- Sufficient financial literacy to understand, analyse and interrogate financial reports including balance sheet and cash flows;
- Experience managing a significant capital expenditure project of £1m+;
- Experience managing most or all of relevant support functions within a SME environment (c £5-20m revenue);
- Strong team leadership record, particularly of small teams of people, (preferably within areas directly comparable for the Bursar's role, e.g. Finance, Estates, HR, IT);
- Experience managing outsourced contracts for services, e.g. IT, catering, cleaning, transport;
- Experience managing charitable investments, including working with an investment manager;
- To have demonstrated a regular ability to go the extra mile, over and above your job description, to make sure things get done.

## SKILLS AND ATTRIBUTES

- Excellent planning and organisational skills;
- To recognise and ask questions when out of your depth;
- The ability to craft and present coherent arguments and "business cases" to support executive decision making;
- The ability to proactively manage business risk;
- A clear heart for independent education, and in particular the Finton House principles of non-selective entry and inclusion;
- The ability to respond nimbly and professionally to unexpected developments;
- To go the extra mile and lend a hand whenever required;
- To juggle multiple different simultaneous priorities.

# Terms of appointment

Salary will reflect the seniority of the role and will depend on skills and experience.

Fee remission: Permanent employees benefit from a staff discount on fees for all children attending Finton of 65% (pro rata).

Pension: Finton House operates a generous defined contribution pension scheme for all employees. Support staff are enrolled into Scottish Widows with an employer contribution of 7.5%

## How to apply

Saxton Bampfylde Ltd is acting as an employment agency adviser to **Finton House School** on this appointment.

Candidates should apply for this role through our website at [www.saxbam.com/appointments](http://www.saxbam.com/appointments) using code **FBKSA**.

Click on the 'apply' button and follow the instructions to upload a CV and cover letter, and complete the online equal opportunities monitoring\* form.

The closing date for applications is noon on **Friday 17<sup>th</sup> November 2023**.

\* The equal opportunities monitoring online form will not be shared with anyone involved in assessing your application. Please complete as part of the application process.

### GDPR personal data notice

According to GDPR guidelines, we are only able to process your Sensitive Personal Data (racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data, health, sex life, or sexual orientation) with your express consent. You will be asked to complete a consent form when you apply and please do not include any Sensitive Personal Data within your CV (although this can be included in your covering letter if you wish to do so), remembering also not to include contact details for referees without their prior agreement.

### Safeguarding

Finton House Educational Trust is committed to safeguarding and promoting the welfare of children and young people. Applicants must undergo child protection screening, including checks with past employers and Disclosure and Barring Service. Details of all checks are to be found in our Recruitment, Selection & Disclosures Procedure, which is available on request.

# Saxton Bampfylde

A photograph of two children in school uniforms. On the left is a young boy with curly brown hair, looking slightly to the left. On the right is a young girl with brown hair in braids, smiling at the camera. Both are wearing dark blue school jackets with white piping and a crest on the chest. The background is a soft-focus outdoor setting with green foliage.

## LONDON

9 Savoy Street  
London WC2E 7EG

## EDINBURGH

46 Melville Street  
Edinburgh EH3 7HF

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