



# Moorlands School

*Set them on the right path*

## APPOINTMENT OF BURSAR

### Summer 2022

Applications will close on Monday 9th May at 12.00 midday

Long List interviews will take place during the week of the 16th May

Short List interviews will take place on Tuesday 24th May.

Visits to the school are welcome.

# An Introduction to Moorlands



Moorlands School is a small, thriving prep school of some 155 pupils. It has an excellent reputation in a competitive local market for independent education, with many families coming to the school via recommendations. The school is a friendly, family environment with one form entry and high expectations of pupils of all ages. Moorlands is the oldest prep school in Leeds and next year will be celebrating its 125th anniversary. The school is a member of IAPS and an acquired school in the Methodist Independent School Trust. The school also has a close working relationship with the local MIST trust school, Woodhouse Grove School.

We are in a convenient location near to the Ring Road in North Leeds and have excellent parking and facilities. As well as the historic main building, there is a swimming pool, sports field, large gym, bushcraft areas and direct access to The Hollies - part of the Meanwood Valley Trail. Moorlands also has a trading subsidiary, Moorlands School Enterprises Ltd, which deals with external hire of the buildings and facilities onsite.

As a member of the Senior Leadership Team (SLT), the Bursar will work alongside the Moorlands' Governors and Headteacher on the overall strategic direction of the school.

Moorlands is committed to safeguarding and promoting the welfare of children. The Bursar is expected to be committed to their responsibilities and requirements in this crucial area.



# Responsibilities and Scope



**The Bursar's main areas of responsibility encompass the following areas: -**

- Strategic planning
- Financial management
- Member of the Senior Leadership Team
- Premises management
- Health and Safety processes
- Administrative effectiveness
- Clerk to the Governors
- School Representation

## The Scope

The role is offered as part-time and permanent, subject to a probationary period.

The role is for three days a week during term time, with an additional 18 days to be worked during school holidays and a yearly total of four INSET Days prior to term starting. Other ad-hoc hours additionally to be worked in school either side of the term as needed to discharge the duties of the Bursar.

The role would start by 01 August 2022 but an earlier date would be possible and opportunities to meet staff and parents appreciated in the summer term.

Lunch is provided, as are drinks.

The Bursar is responsible to the Governing Body for the conduct of the financial affairs, business management and material state of the premises and to the Headteacher for the day-to-day administration.

The Bursar line manages:

- The Caretaker, and through them the maintenance support and cleaning teams
- The administration team

There are a number of events that staff attend, including the Summer Fair, Christmas Fair and Speech Day, which are required as part of the role.

Salary offered will be subject to qualification and experience and appropriate to the role.

# Job Description

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The role is including, but not limited to, the following:

## **Financial Management**

In conjunction with the Deputy Bursar and Finance Assistant and under the direction of the Moorlands' Governing Body and MIST: -

- Maintain the accounts of the school in line with recognised accounting practices and other legal requirements
- Preparation of termly management accounts, cash flow forecasts and other reports as required by the Headteacher, Moorlands' Governors and MIST
- Preparation of any other papers requested by the Governors to inform their decision on matters such as the annual fee increases
- To report immediately any exceptional variances
- To use benchmarking tools to identify areas of relative spend, assess trends, and identify areas where economisation could be achieved
- Liaise with the MIST Group auditors in the preparation of statutory accounts
- To advise on general financial policy within the school, preparing appraisals for projects as they arise and preparing a long-term financial strategy in conjunction with School Governors and the Headteacher, for the future development of the school
- Prepare and submit annual estimates of income and expenditure as required by Governors and MIST
- To obtain agreement of budgets and to monitor accounts against budget, both at departmental and whole school level
- Submit information to the Charity Commission as required and ensure that the school operates within the stated aims and objectives
- Be responsible for the management of procedures and controls for the authorisation of expenditure; monitoring income and expenditure against budget and ensuring a regular system of reporting to the Headteacher, SLT and Governors
- Keeping a clear view on overdue fees, resolving such and managing debt recovery effectively
- Administering the bursary system for parents and prospective parents needing financial assistance
- Supervising the School's insurance in all its forms and dealing with any insurance claims. Liaison with the School's insurance brokers to ensure that adequate cover for the school and pupils is in place
- Representing the School at Bursar's forums or other relevant meetings

## **Premises management**

The Bursar has primary responsibility to present the premises in its best state at all times. He/she is assisted in this by the School Caretaker, Assistant Caretaker and cleaning team.

- Strategic overview of the maintenance and refurbishment of School buildings, security, fire prevention, boilers, swimming pool and the maintenance of the buildings, including maintenance schedules and record keeping
- Oversee the management of the maintenance schedules and the efficient operation of all facilities on the site
- Oversee the upkeep of the playing fields, gardens, boundaries, roads, land drainage and woodland.

# Job Description Continued...



- Oversee the purchase, repair and maintenance of all furniture and fittings
- Liaise with architects and planning departments with regard to building improvements and new capital projects
- Negotiate, manage and monitor contracts, tenders and agreements for the provision of support services such as energy supply, telephone and broadband communication
- Negotiate and manage capital and maintenance projects and regularly monitor and review such projects to ensure control and, where possible, savings on expenditure
- Encourage a proactive approach to the maintenance needs of the school, keeping an overview of required works logged on the school's maintenance management system
- Oversee the procurement and maintenance of minibuses and be responsible for conforming with legislation for minibus travel and drivers

## Health and Safety

- To act as the School's named Health and Safety Officer
- Maintain the School's health and safety policies to comply with requirements so that the Health and Safety at Work Act and other legislation, including risk management and hazard identification, are met
- To oversee procedures to ensure the well-being of staff, pupils and visitors and compliance with Health and Safety legislation, both on the school premises and, in conjunction with the responsible teaching staff, for school trips and outings
- To be aware of the importance of a disaster recovery plan and its place within the management procedures of the School
- To schedule and Chair the termly Health and Safety Meetings, advising staff of required attendance and ensuring that accurate minutes are produced and circulated and to report on Health and Safety matters at each meeting of Governors.
- Keeping abreast of Health and Safety and Disability Access legislation and ensuring compliance in all areas
- To act as Fire officer and to be responsible for the installation and maintenance of equipment for protection against, detection of and escape from fire. In conjunction with the Caretaker, to initiate fire practices and alarm tests. To ensure that emergency procedures are current and timely
- To be responsible for the security of the school site

## Clerk to the Governors

- Prepare the agenda, minutes and other documentation for the meeting for the Board of Governors and their committees
- Collate and disseminate reports prior to meetings, allowing one week for reading time
- Provide information as required by the Chair at any time
- Maintain the register of Governors, co-ordinate Governor administration, including but not limited to nominations, and the Governors' meeting calendar

# Job Description Continued...



## General Admin

- Overseeing the secretarial and administrative roles, including administration for parents, prospective parents and staff
- An executive role in maintaining the school's administrative policies and procedures in keeping abreast of legislation and ensuring compliance in all areas.

## Catering, Human Resources, IT and Data Protection

In these areas, management, specialist advice and practical support are provided to Moorlands via a Service Level Agreement with Woodhouse Grove School (WGS) . The Moorlands' Senior Leadership Team work closely with these professionals. Within this framework, the Moorlands' Bursar would be required to:

- Be trained in, and fully conversant with, Safer Recruitment, sitting on interview panels as required
- Oversee the school's IT infrastructure and systems including provision and development of non-curriculum based IT systems, in conjunction with IT expertise and support provided by WGS
- In their working practices, ensure compliance with Data Protection legislation

## Person Specification

### Qualifications:

Qualified to degree level, or equivalent, potentially with a profession qualification in finance, management or equivalent experience

### Essential Skills and Knowledge

- Highly effective written and verbal communication skills
- Full computer literacy (Microsoft Office, Sage or similar) and the ability to the School's iFinance system.
- Strong IT skills and able to use and interrogate a database e.g. for fees and payments
- Working knowledge of financial and Health and Safety legislation
- Able to manage, lead, organise, deploy and motivate a support staff team
- Able to lead school facilities and contracts
- Able to establish and develop positive working relationships with the community
- Able to manage deadlines and priorities
- Able to maintain strict confidentiality
- Able to formulate ideas and solutions and present them to relevant stakeholders
- Knowledge of payroll and pensions
- Able to deliver value for money initiatives
- Have familiarity with conducting business in an educational environment (preferred but not essential)
- Be a strategic thinker with ability to formulate ideas and take a long term view
- Have budgetary experience
- Confidence to say 'no' when required!
- Be highly motivated and able to meet objectives through own initiative
- Demonstrate the highest levels of integrity and ability to maintain strict confidentiality

# Job Description



- Be committed to safeguarding and equal opportunities
- Have experience in financial management, including end of year accounts and preparing projections
- Experience of liaison with external auditors

## Personal Qualities

A good team player, who is kind and honest

Resilient and adaptable

Hardworking

Organised, efficient and able to prioritise in demanding situations



# The Application Process

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Applications should be accompanied by a covering letter not exceeding two pages, which clearly outlines your skills, experience, and reasons why you are interested in applying for this role.

Your completed Application Form, together with your covering letter, should be sent to:

Miss Jacqueline Atkinson  
Headteacher  
Moorlands School  
Foxhill Drive  
Weetwood Lane  
Leeds  
LS16 5PF

Or email to [head@moorlands-school.co.uk](mailto:head@moorlands-school.co.uk)

Applications will only be accepted from candidates completing the Application Form in full.

**Deadline 12 noon Monday 9th May.**

CVs will not be accepted in substitution for Completed Application Forms