

Director of Finance and Operations



Information for candidates



Queen Margaret's
School for Girls

Escrick Park, York

A family of
learning
and
belonging

Head's Welcome

Thank you for your interest in the position as Director of Finance and Operations at QM.

This is an exciting time to join QM with current energies focused on shaping the school's future strategic direction and setting it on a strong trajectory for the next chapter of its history.

QM is a very special school, whose warm, nurturing environment and incredible breadth of opportunity enable girls to flourish and grow into confident, talented, independent young women. Escrick Park provides a superb educational environment for the girls during term time with wider opportunities for external use during holiday periods.

Life at QM is busy and very rewarding. The successful applicant will be someone who can bring strong leadership, creativity and expertise to the role whilst embracing everything that comes with being part of a vibrant boarding and day school. Our committed and collaborative staff team put the girls at the heart of everything we do.

If all this sounds like a good fit, we would love to hear from you.

Nicola Dudley
Head



Queen Margaret's

Established in 1901, QM is an independent boarding and day school for girls aged 11-18. You will find us in glorious parkland about six miles south of York. But we are much more than our surroundings, we are more than a school:

We're a home from home.
A family of learning and belonging.
In a truly inspirational setting.

We are somewhere each and every girl can thrive.
Where they'll be happy and healthy.
Grow their knowledge, skills and confidence.
And make friends for life.

Somewhere that's the bedrock for success.
Opens up opportunities and possibilities.
Inspires them to forge their own future.
And gets them ready for life, whatever their calling

We nurture girls to fulfil their ambitions.
To realise their potential.
To become the best women they can be.
And give them an amazing start in life.

Girls do so much better in single-sex education and here we see our pupils engaging enthusiastically in a range of activities - academic, sport, extracurricular and social. No airs and graces, no frills or make-up, just girls getting stuck in, and having fun while they do it. They achieve academically (outstandingly so), they come from a variety of backgrounds and, with an increasing emphasis on the support available we are proud that we are continuing to make a QM education possible for an increasingly diverse range of girls. Our girls have homes in York, Ripon, Thirsk, Newcastle upon Tyne, Inverness, Hong Kong, Madrid, Frankfurt and Bangkok and many board, not because they have to, but because they want to.

The girls are the focus of life at QM and are at the heart of everything we do. It's this focus and an individualistic approach that allows our girls to carve their own path, and flourish as formidable, independent women.

Working at QM

"In an all-girls environment I've been able to try so many new things; and the staff are always there to help and encourage you. In a mixed school I wouldn't have had the confidence."

So said one Sixth Former, and we see the results as our girls go out and take on the world.

They enter top rank universities and their personal attributes – from self-confidence to soft skills such as communication and teamwork – ease them into really interesting jobs. Every independent school says as much, but at QM you only have to meet our girls to see the living proof. We can focus intensely on the needs of each girl because we are a small school, and we shall stay small for that reason.

We are an equal opportunities employer and actively seek applications from candidates of all genders and all backgrounds. We employ around 170 staff, with the majority living within 30-45 minutes of the school including York, Hull, Leeds and Harrogate.

Working in a boarding school is an experience like no other. The sense of community is very strong and the opportunity to get to know both girls and staff is more apparent than would be the case in a day school. There are lessons on a Saturday morning and our term dates are shorter than schools in the state sector though we adhere wherever possible to the half term dates of the local authorities in order to support our staff with children of school age.

Most girls stay at school after their lessons finish each day, either because they are boarders or because they are involved in activities. There are a variety of enrichment activities and clubs on offer including horse riding, squash and tennis coaching plus clubs as diverse as debating, fashion, philosophy and swimming. We have extensive sports facilities and all girls play hockey, lacrosse, netball and rounders as well as an array of other sports. Day girls are able to stay until 19:30.

We are not a particularly selective school, we are, after all, a place where each and every girl can thrive. This, in turn, meant our 2022 results days brought lots of happy girls; at A Level nearly half (49%) of all girls achieved two or more of the much sought-after A*-A grades and 91% of all entries scored A*-C. At GCSE a quarter of all entries were marked at grade 9 and 40% of girls achieved five or more 9-8 grades. We assess all girls on entry to the school and those in need of additional support are overseen by our PASS department. Class sizes are small with the largest classes being no more than 15 girls, many are less.

Living in Yorkshire

Yorkshire is often called 'God's own county' and many Yorkshire folk would agree. The people of the region are friendly, welcoming and down to earth with a 'can do' mentality which is dynamic and uplifting.

The school is only 20 minutes away from the beautiful and historic city of York, voted the Best Place to Live in the UK by the Sunday Times. Property prices are reasonable, (like anywhere, there are variations) and there are many picturesque villages and market towns in the Yorkshire region which make an attractive base for those enjoying the great outdoors and a Yorkshire welcome, as well as those who want to access the high quality arts venues in the region or, indeed the magnificent Yorkshire coast.

York is a major transport hub with frequent trains to London (you can be there in less than two hours), Leeds, Manchester, Newcastle and Edinburgh. There are also good road links via the A1, M1 and M62 so the area feels at the heart of the UK. We might be biased but there are few better places to live and work.

Job Description

The Director of Finance and Operations is a key member of the school's Senior Leadership Team (SLT). Responsibilities of the role include:

Strategic Leadership and Management

- Ensure the smooth running of all the school's support operations
- As a key member of the SLT, contribute to developing and implementing the school's vision and strategy, with particular responsibility for business and operational performance
- Lead by example: be an inspiring leader of the support staff, encouraging them to work to the best of their ability whilst also facilitating strong working relationships between them and the teaching staff
- Work with the Governors to ensure the school has a regularly updated strategic long-term plan for the adequate financing of the school, considering all sources of finance and the assets of the estate.

Governance

- Liaise with the Clerk to the Governors as necessary to ensure a smooth flow of essential information to the Board in a secure manner and to prepare for meetings of Committees of the Board and of the Board itself
- Attend all Board meetings and Committee meetings of the Board as a matter of routine.

Finance

Supported by an experienced team, overseeing the day-to-day financial management of the school, the Director of Finance and Operations responsibilities include:

- Budget setting, financial forecasts and cost control across the whole school, including:
 - Working with the Head/Senior Deputy Head keeping the teaching hours required and available under review
 - Liaising with the Director of External Relations, ensuring that the financial recruitment targets, including bursaries and remissions are managed
 - Managing the cash flow across the school year
 - Advising Governors on setting fees and charges.
- Advising on the setting of salaries and reviews
- Preparing regular management accounts as required by the bank and Governors
- Planning, procurement and project management of capital projects
- Agreeing an annual programme for capital expenditure and ensuring that long-term funding is available for rolling replacements (e.g. IT equipment)
- Collection of fees and charges, including dealing with fee debtors
- Ensuring that the terms and conditions in the parents' contract are appropriate, up-to-date and compliant
- Keeping the school's financial procedures up-to-date and compliant
- Payment of salaries, pension contributions, PAYE and NIC payments, expenses, invoices, etc
- Assessment, allocation and management of bursaries and remissions
- Keep under review the school's Discounted Fees in Advance Scheme and manage the acceptance of fees under that scheme
- Handling Gift Aid, VAT and other tax issues
- Day-to-day banking requirements and leading the relationship with the school's bank, including ensuring that banking covenants and bank reporting requirements are met
- All insurance matters
- Oversight of QM's pension plan for support staff and teachers not in the Teachers' Pension Scheme (TPS) including the liaising with the school's pension advisors
- Administration of the Teachers' Pension Scheme
- Deliver an operating surplus as agreed by the Governors
- Provide the Governors with regular, accurate and timely information about the school's finances, including monthly management accounts and supporting papers (including cash flow forecasts, budget and variance reports)
- Working with the school's auditors, keep the accounts of the school and prepare Statements of Financial Activity (SOFA) and balance sheets in accordance with the charities Statement of Recommended Practice (SORP)
- Oversee the work of the Accounts Office, ensuring the effective and timely processing of the payroll and pensions, billing, purchasing and the Asset Register
- Ensure that a robust system of internal controls is in place and operated effectively
- Analyse school fees and costs, including benchmarking
- Maintain the Asset Register
- Ensure fair but robust debtor management, including meeting with parents when necessary
- Advise the Governors on borrowing requirements and ensure compliance with any covenants
- Manage relationships with key external services, including the bank, auditors and insurers
- Manage effective purchasing arrangements and review and negotiate tenders and contracts.



Job Description cont...

Human Resources

Supported by a qualified HR Manager, the Director of Finance and Operations has overall accountability for the management of the support staff and supports the management of teaching staff. There are currently approximately 153 on payroll, including full and part-time staff. Responsibilities include:

- Review and sign-off for all staff recruitment
- Working with the HR Manager to ensure policies and other HR documentation are updated to take account of new regulations and legislation
- Working with the HR Manager, ensure Safer Recruitment procedures for all staff and safeguarding issues relating to the support staff are complete
- With the HR Manager, assisting senior colleagues with disciplinary, capability and grievance matters for all staff
- Ensuring that salaries are regularly reviewed and remain competitive
- Oversight of the Single Central Register
- Drive the identification, assessment and management of business risk, including oversight of the risk assessment process and Risk Register
- Lead critical incident and business continuity planning to ensure that the school is well prepared for any crisis
- Manage the school's insurance arrangements, liaising with the insurers and advising the Governors.

Estates, Catering, Housekeeping

Supported by the Estate Manager, Housekeeper and Senior Chef/Senior Supervisor, the Director of Finance and Operations is responsible for:

- The school's estate, consisting of approximately 75 acres of Grade 2* listed buildings and grounds, including the historic main building:
 - The maintenance and improvement of all the above facilities, to ensure that they provide a safe and secure working environment for teaching, learning and boarding together with a wide range of other activities
 - All caretaking, maintenance, domestic and grounds maintenance services
 - Procurement of vehicles, furniture and equipment
 - Manage energy and utility contracts
 - Management of the school's vehicles (minibuses, van and grounds maintenance vehicles)
 - The school's commitment to sustainability.
- Provision of all catering services through our own in-house Catering Team
- Provision of housekeeping services (currently largely staffed by our own cleaners)
- Recruitment and management of all Support Team staff
- Providing direction for members of the support staff across the school, ensuring their integration with wider school and understanding of the school's educational requirements, policies and procedures
- Training and professional development for the support staff, including appraisals.

IT Services

- Provision of first-class IT infrastructure and support (through the Director of Digital Strategy) in accordance with the needs of the school
- Provision of audio-visual equipment and services (through the Director of Digital Strategy)
- Provision of the school's existing Digital Learning Programme, ensuring this meets the changing needs of teachers and pupils.

Other Services

With the Events Manager, promote and develop the external hire of school facilities so as to maximise the revenue obtained, including the associated licences.

Job Description cont...

Compliance

Supported by the Compliance Manager, this is an important area of responsibility and includes:

- Overseeing and ensuring that the school is keeping up-to-date with changes in employment law and other legal requirements, and that these are reflected in the HR and wider policies and practices for the school and meet current compliance and good practice standards that are relevant to the school's activities, including:
 - charity law
 - company law
 - employment law
 - equality legislation
 - property law (for leases, etc)
 - building regulations and related legislation
 - health and safety law and regulations
 - fire regulations
 - pensions law and regulations
 - data protection law
- Together with the Governors and SLT, ensuring compliance with the Independent Schools Inspectorate (ISI) regulations and National Minimum Standards for Boarding (2022), in particular with regard to safety and welfare, provision of premises and safer recruitment
- Act as the school's Privacy and Compliance Officer and ensure that the school maintains robust and effective data processing and privacy policies, and processes all personal data in compliance with such policies and data protection law
- Oversee prompt and effective responses to all individual requests and enquiries concerning the school's use of individual's personal data including Subject Access requests
- Working with the Support Team Managers to create and implement a range of school policies
- Alongside the Estates Manager and Compliance Manager and the Head, ensure compliance with the requirements of Health and Safety legislation, take responsibility for the school's Health and Safety Committee
- Liaising with the local authority and various statutory authorities on a range of issues (planning, traffic, drainage, etc).

In addition to the above responsibilities, the Director of Finance and Operations is expected to:

- Have or develop a good working knowledge of education at Secondary and (ideally) higher levels, in order to understand the needs of the school and ensure that appropriate support is provided
- Keep abreast of all developments relevant to the sector through networking, including through the Independent Schools' Bursars Association (ISBA) and other professional institutes
- Seek out and establish valuable partnerships between the school and local businesses, clubs, and societies
- Undertake such training and professional development as may be required
- Support related organisations such as the Old Margaretian Association (OMA)
- As for all QM employees, to take an interest and be involved in the wider life of the school.





Person Specification

The successful candidate will have strong educational results including an undergraduate degree, or equivalent, with strong intellect. An accountancy qualification is desirable.

Finance Experience

- A proven track record of successful strategic financial management
- Experience of working at or near board level as a member of a senior leadership team, offering sound commercial and strategic advice
- A proven ability to manage complex models and implement financial strategy
- Ability to use analysis and data to manage risk, reveal insights and drive continuous improvement
- Commercially astute, technically strong with the ability to be effective at both strategic and operational levels.

Broader Experience

- A proven capacity to take a strategic overview and contribute to the wider strategic development of the school whilst retaining a strong grasp of the operational detail
- Demonstrable experience and success in delivering excellence in operational services (beyond the parameters of a purely financial role)
- Experience of successful project management and completion
- Knowledge of fundraising and its contribution to the school's development.

The Board of Governors warmly welcomes applicants from a wide range of backgrounds and with varying experience. It is thought the successful candidate will possess the following:

- Vision, energy and the ability to motivate and develop the skills and experience of others
- Experience of managing and motivating a large team of diverse individuals
- The ability to lead by example, empower others and command respect, both within the immediate school community and in the wider professional arena
- Provide support and counsel to the Head where necessary.

Personal Qualities

- A strong team player with a positive, 'can do' approach and willingness to embrace new ideas
- Significant stamina, drive and commitment matched with patience, diplomacy and flexibility
- Excellent interpersonal and influencing skills with the ability to communicate effectively with people at all levels
- Sensitive, caring and compassionate, able to deliver complex and politically sensitive change
- Resourceful with strong negotiating skills and the willingness to challenge perceived norms
- The drive and ability to meet challenging goals
- Calm and able to manage a crisis effectively
- Outstanding work ethic and able to efficiently manage a complex workload by organising, prioritising, and multi-tasking
- Work flexibly according to the needs of the school, Governors and the post, taking annual leave at times that are commensurate with the needs of the school.

Terms and Conditions

A highly attractive remuneration package is offered, reflecting the seniority and significance of the position. The eventual salary will be negotiable and will depend on experience. The main provisions are likely to include:

- Membership of the school's Defined Contribution Pension Scheme: employer contribution 8.4%
- Six weeks' annual holiday, plus bank holidays
- Children of full-time members of staff are entitled to a fee remission, subject to satisfying the usual entry criteria
- School lunch is provided free of charge during term time
- There is free car parking on site.



Application Process

Queen Margaret's is being assisted in the recruitment of this key appointment by the **Independent Schools' Bursars Association (ISBA)**, from whom a Candidate Pack can be obtained by sending an email to recruiting@theisba.org.uk

Alternatively, if you would like to discuss the position with ISBA prior to applying, please contact **Lucy Wyatt** on **07817 038009**.

Closing date for applications is 4th November 2024.

Screening interviews will be conducted by the ISBA recruitment team and short-listed candidates will attend first stage interviews mid-November 2024 at Queen Margaret's School.

The ISBA reserves the right to close this position early in the event that they receive a high volume of suitable applicants.





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