# BUSINESS MANAGER capability framework

**Version: Reviewed and updated on 02 March 2021**

Effective business managers support school leaders to facilitate school improvement through effectively managing change and resources. Under the leadership of the principal, the business manager role supports strategic resource management to achieve effective outcomes for the school community.

The Business Manager Capability Framework (the Framework) illustrates the full range of skills and capabilities essential for a school business manager to be effective in their role. The Framework elaborates on possible actions for each capability which supports school business managers to understand the specific actions associated with the role but acknowledges that the work of business managers varies across different school contexts (e.g. size, primary/secondary, geographical location). A business manager should apply the list of possible actions as set out below in the context of the Dimensions of Work for the Education Support Class at their own classification level and range.

| Capability | | Capability definition | Elaborations of possible actions |
| --- | --- | --- | --- |
| Technical Skills | Finance and Procurement | Implements effective, efficient and ethical financial management and budgeting processes. Understands and manages procurement activities. | Uses the [Finance Manual](https://www2.education.vic.gov.au/pal/finance-manual/policy) on the Policy and Advisory Library (PAL), the CASES21 process guide and relevant processes as required to ensure financial compliance.  Knows the various purchase limits and ensures the correct form is used (e.g. R1a, R1b) for purchasing.  Refers to the Department’s [school budget information](https://www2.education.vic.gov.au/pal/student-resource-package-srp-managing-budget/policy) on the PAL.  Uses the [Procurement Guidelines](https://www2.education.vic.gov.au/pal/procurement-in-schools/policy) on the PAL to manage the school’s procurement processes.  Checks that the required number of vendor quotes are obtained prior to purchase of goods.  Checks that goods and/or services are received prior to signing delivery dockets/invoices for payment.  Regularly reviews supplier contracts and ensures the school continues to receive the best value for money. |
|  | Governance Acumen | Understands how to implement good governance. Applies governance framework to decision making and accountabilities. | Refers to guidance on [effective governance](https://www2.education.vic.gov.au/pal/school-council-training/guidance) on the PAL and collaborates with school leaders to develop clear policies and procedures.  Oversees the implementation of policies and procedures including supporting School Council to move the correct motions to pass planned financial activities of the school (e.g. fundraising). |
|  | Operational Acumen | Develops and implements plans and processes to facilitate effective and efficient operations, including simplifying complex practices. | Knows the Department’s different programs (e.g. CASES21, eduPay, recruitment online) and develops and implements improvements to processes for others to use these programs (e.g. for parent payments, excursions, facilities management and staffing).  Reviews and implements improvements to the school’s processes and practices in collecting, producing and generating reports of CASES21 data for reporting to the Department, School Council and other stakeholders.  Knows staff member’s skills, knowledge and experience in using the Department’s programs and supports staff to accesstraining and support as required. |
|  | Resource Coordination | Builds processes and organises people and activities, sees opportunities for synergy and integration to get more effective outcomes out of fewer resources. | Consults with school leaders and other staff to develop and effectively communicate schoolwide processes for purchasing to staff (e.g. for IT and facilities).  Liaises with other staff to ensure resources such as transport or equipment are available for use when required.  Works together with school leaders to identify opportunities to improve allocation of the Student Resource Package to priority areas of the school and support the achievement of the School’s Strategic Plan and Annual Implementation Plan. |
|  | Risk Management | Systematically identifies evaluates and prioritises potential risks and communicates information to enable appropriate decisions and actions. | Develops and communicates risk management information to administrators and other staff for required financial administration.  Reduces risk of fraud by ensuring separation of duties when entering orders and authorising cash payments.  Reduces risk of incurring losses by reviewing prior year percentages of attendees for camps and excursions in calculating expected attendances for income and per capita cost for the event.  Evaluates school procedures on risk management in areas including OHS, facilities hire, Work Cover and Return to Work Coordination to ensure these are aligned with DET guidelines and communicates improvements with staff as required. |
| People Skills | Stakeholder Engagement | Builds and maintains effective relationships with stakeholders and focuses on understanding and meeting their needs. | Is proactive in developing a positive working relationship with the leadership team, staff, parents/carers, contractors and the wider school community through open mindedness, resilience and empathy.  Listens to ideas and is open to other perspectives. |
|  | Relationship Building | Develops partnerships and collaborative relationships, both internally and externally, to facilitate the achievement of mutual objectives. | Uses inclusive language and behaviours to develop positive relationships with school leaders, staff, parents/carers, and the wider school community.  Develops constructive relationships with suppliers and contractors to ensure best value and benefit to the school.  Proactively develops relationships with other business managers by participating in a range of forums and/or support networks to identify and share best practice. |
|  | Supportive Leadership | Proactively addresses issues and concerns in an empathetic and sensitive manner. Effectively shares ideas, thoughts and information to support outcomes. | Actively works to build trust with parents/carers and other members of the school community, ensuring confidentiality and privacy are maintained.  Initiates the sharing of ideas with school leaders to support achievement of School Strategic and Annual Implementation Plan objectives.  Initiates the sharing of skills, knowledge, and expertise to support the learning and development of other school staff. |
|  | Communicating with Others | Makes a positive impression and effectively negotiates with and influences others. Focuses clearly on finding cooperative solutions and outcomes. | Engages in open and honest dialogue with others to understand different viewpoints when problem solving.  Adapts communication methods as required in different situations. |
|  | Teamwork | Actively participates as a member of a team to support team goals, fostering collaboration and an environment of mutual trust and respect. | Genuinely considers other perspectives and uses inclusive language in communication.  Leads and encourages others to collaborate and share ownership of the work.  Supports others to develop skills as required. |
| Self-Mastery | Ethics and Values | Models strong public-sector values and professional ethics. Adheres to these in all circumstances relevant to their role. Maintains confidentiality and supports others to do the right thing. | Always models the [Victorian Public Sector Values](https://vpsc.vic.gov.au/ethics-behaviours-culture/public-sector-values/) through the role.  Models integrity by being prepared to have honest and open conversations with school leaders and being available to support other members of staff to ensure that appropriate procedures are followed.  Models leadership by demonstrating commitment to professional learning and encouraging staff to pursue relevant training to improve understanding of policies and processes. |
|  | Problem Solving | Anticipates future needs and provides advice to assist in forward-planning. Solves problems using logical methods to reach effective solutions. | Engages in consultation with others to identify emerging opportunities and challenges to inform forward planning.  Anticipates the impact of internal or external circumstances on the school’s financial position and takes the initiative to support the leadership team in finding solutions. |
|  | Flexibility | Adapts own approach to meet different situations. | Understands the specific requirements of the school and adapts processes in accordance with Department guidelines.  Adapts responses to situations as they arise or evolve in an effective and timely manner. |
|  | Organising and Planning | Creates plans, forecasts and organises activities required to achieve a desired goal. | Gathers relevant information, data, and resources to support planning for desired objectives.  Uses the Department’s guidelines to prepare and present annual and staffing budgets to support workforce planning and maintain financial viability of the school.  Adheres to all required budgeting timelines.  Collaborates with school leaders to develop a workforce plan as part of effectively allocating the Student Resource Package. |
|  | Resilience | Effectively deals with pressures and competing priorities. Maintains respectful working relationships while dealing with conflict and challenges. | Effectively prioritises tasks in order of urgency and importance.  Models a positive attitude and mindset.  Maintains calm and respectful communication with others during stressful situations. |