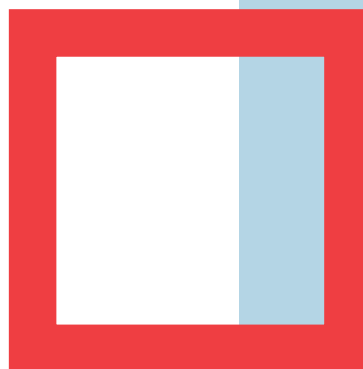


Looking for a Bursar?



Introduction

In January 2003, Government, employers and school workforce unions signed a national agreement that paves the way for radical reforms of the school workforce, enabling teachers to focus on their teaching by freeing them from tasks that can be done by other appropriately trained staff. Bursars and business managers can play a significant part in these 'remodelling' reforms, bringing their expertise to bear on the planning and management of resources, as well as taking some of the management load off headteachers.

The guide is intended to assist heads, governors, and others involved in running schools, who may be thinking of taking on a bursar or developing the contribution of someone already employed by the school. It is in two sections. The first section "Why Have a Bursar?" (pages 2 to 7) discusses the benefits which bursars can bring to schools, and the specific gains to headteachers and others. The second section "Bursar Modular Job Description" (pages 8 to 16) offers heads and others help in drawing up job descriptions and/or specifications for bursars.

We have also set up a dedicated 'Bursars' area on the TeacherNet website (www.teachernet.gov.uk/bursars) which gives full details of the Bursar Development Programme. This includes bursar training; 'case histories' – covering primary, secondary and 'shared' bursar arrangements; and how the Department is promoting the role as part of the 'remodelling' agenda.

In both sections of this guide, bursar tasks and responsibilities are set out at three levels "basic", "intermediate", and "advanced". These descriptors have been used to help explain the potential span and range of the role of bursars. They do not necessarily equate to

particular sizes or types of schools, nor do they imply that a bursar who is undertaking the “basic” level functions in some areas cannot make a weightier or more strategic input in other areas. The idea is that they can be put together in different combinations to meet the needs of schools and reflect the competences of individuals.

The term “bursar” is used here broadly, for convenience. But it doesn’t matter what name “bursars” go by – “school business manager” and “senior administrator” are commonly used alternatives. What matters is that schools secure the financial, administrative, and other advice and support that a skilled and competent individual can bring.

Many schools already employ bursars or staff who are ready to be developed into the role. **Bursar training** leading to a Certificate and Diploma of School Business Management is now available from the National College for School Leadership (NCSL). The training covers the functions described in this document, and is open to everyone who is already working in a maintained school in England, or who intends to do so.

The emphasis is on enabling participants to make a greater practical input to schools. One head commented after their bursar had gone through the pilot course:

“She now makes a tremendous contribution to improving standards... being a primary school everything that she does impacts on the teachers’ ability to deliver to the pupils.”

For more details of the course see Annex 1 (pages 18 to 20).

Why Have a Bursar?

Regardless of how big or small a budget any school has, there are always competing demands and pressures. Difficult decisions are needed every school year about how many staff there should be, and what kind of staff they are. For understandable reasons, heads and governors can find themselves taking short-term solutions. But in the longer run, they may be passing over opportunities to put their school on a surer footing.

Why bother with bursars? Isn't it better to muddle through with the head, or teachers, or the school secretary filling in as best they can? What do bursars know about teaching anyway? Won't the children get more out of an extra teacher? And if things go wrong, won't the LEA bail the school out?

In the end those are questions for you to answer – it's your school, and no two schools are the same. But at least you may want to consider what a bursar can offer.

There is no 'one size fits all' bursar – smaller schools sometimes club together to employ a 'shared bursar' who works with the heads and administrative staff of a number of schools and facilitates the spread of good practice for mutual benefit. Some schools contract for bursar services.

Bursars can play a crucial overall strategic role in implementing 'Best Value' – by making the most of school resources so that more is available for teaching and learning. They can use a variety of financial management and performance information to 'benchmark' their school to assess how effective they are at using resources compared to other schools and businesses. We have set up a Benchmarking website to facilitate this containing data from over 20,000 schools (www.teachernet.gov.uk/schoolfinance). A revised School Finance Pack can be found on the Value for Money website (www.dfes.gov.uk/vfm) and TeacherNet also has a dedicated School Funding area (www.teachernet.gov.uk/schoolfunding).

So if you don't already employ a bursar – or if you think your existing bursar, or perhaps another member of staff, can take on a wider, more strategic role – here is some food for thought. Many in the education field believe that bursars can make a very positive difference to the way in which schools are run. Read on to find out why...

1. Bursar – Basic Functions

Functions	Advantages if done by Bursars	Gains to Heads/Others
1.1 Budgets/Monitoring/ Financial Reports/Payroll	Professional expertise/ Experience/Accuracy/ Speed/Able to set up local networks to problem solve/Able to choose appropriate systems	Not doing tasks without necessary skills/ Confidence/Best systems & processes for tasks/Able to use bursar to inform local decision making
1.2 Cash Management	Experience/Ability to earn interest from surplus balances	Peace of mind/Extra cash/Good audit reports
1.3 Securing funds to which school is entitled	Dedicated role increases know-how & familiarity with funding system/Uses knowledge and networks to increase awareness of funding opportunities	Decreases chances of funding going astray
Functions	Advantages if done by Bursars	Gains to Heads/Others
1.4 Recruiting and Managing Support Staff	Leadership/Knowledge of local job market/Better coaching & development/Ensure school's systems meet legal requirements	More coherent staff management/Maximising support staff contribution/Reduce possibility of employment related disputes
1.5 Basic Premises Management	Experience/Understanding of Funding Options/Ability to manage contracts/ Understands options and implications of each	Better able to make informed decisions
1.6 Health and Safety Management	Understanding of relevant Health and Safety legislation	Up to date knowledge of school Health and Safety responsibilities

2. Bursar – Intermediate Functions

Functions (additional to Basic Functions)	Advantages if done by Bursars	Gains to Heads/Others
2.1 Securing bid-based competitive funds	Understanding bidding system/Contacts/Fluent in “resource language”	More money & other resources/Strategic input/Time saved by delegating detail
2.2 Services contract management (catering/cleaning etc)	Commercial hard-headedness/Ability to handle contractors/ Knowledge of law	Better quality services/Value for money/ Peace of mind/No need for day-to-day involvement
2.3 Insurance (inc. supply teacher cover)	Knowledge of insurers & insurance products/Ability to identify right package for school	Value for money/ Insurance package fit for purpose/ Peace of mind
2.4 All staff employment contracts, admin for teacher recruitment	Knowledge of employment law/Effective vacancy ads/Administrative efficiency	More effective recruitment/More efficient administration of teacher contracts/Shows school in a good light for would-be staff and gives existing staff confidence
2.5 Maximising lettings income from out-of-school hours use of facilities	Commercial flair/Knows health and safety regs etc/Can deal with partners & contractors	More income/No need for day-to-day involvement/Fewer problems and concerns
2.6 Premises strategy, services and contracts management	Know-how/Understanding of funding system and DfES guidance/Ability to handle contractors	Sound and fundable capital strategy (inc. Asset Management Plan)/Value for money

Functions (additional to Basic Functions)	Advantages if done by Bursars	Gains to Heads/Others
2.7 Risk Assessment and hazard identification	Knowledge of Risk Assessment tools and Health and Safety procedures established/updated	Robust Health and Safety policy and procedures that comply with legislation
2.8 ICT manager (Purchasing/contract management/Liaison with LEA/DfES/feeder schools)	Dedicated role/Familiarity with ICT products/Can develop and deliver whole-school ICT strategy	ICT needs for curriculum & school admin met/Cost savings/Avoid buying the wrong ICT kit

3. Bursar – Advanced Functions

Functions (additional to Basic and Intermediate Functions)	Advantages if done by Bursars	Gains to Heads/Others
3.1 Securing sponsorship funding	Commercial flair/Range of contacts/Articulate ambassador	Increased resources inc. matched funding/Raised school profile
3.2 Advice on employment law issues	Knowledge of employment law/Experience of similar issues/Keeping abreast of new legislation	Informed advice/Less need for lawyers' input and fees
3.3 Implement Risk Management and loss prevention strategies	Can negotiate 'best deal' to reduce insurance costs	Less burden for heads and reduction in costs
3.4 Advice to head/governors on admissions	Can deal efficiently with admin processes/Can develop admissions strategy	Coherent admission arrangements/Less burdens for heads
3.5 Relationship management (teachers/support staff)	Can act as "bridge" and facilitate closer working	More harmonious working/Increased standards
3.6 Promoting school to parents, partners and local community	Can promote school and raise profile with different audiences/Articulate ambassador/Liaise with local businesses (fund raising, vocational experience for students, joint projects etc)	Less burdens for heads/School better known and supported

WHAT SORTS OF BURSAR ARE THERE?

The split of bursar functions set out here is only indicative – it could well be that a primary school bursar is heavily involved in seeking sponsorship, or promoting the school locally. And whilst it is to be expected that secondary school bursars will usually be responsible for all the functions identified in the three tables, it may be that some basic tasks such as payroll administration would be delegated in larger secondaries.

The type of job done by a bursar depends largely on the needs and circumstances of individual schools. As a head or governor the most important thing is to decide what role the bursar should be playing, and how best they can contribute to the smooth running of the school.

For examples of bursar case histories, covering primary, secondary and ‘shared bursar’ arrangements, see Annex 2 (pages 21 to 28)

All bursars have the capability to make a real difference to the workload of heads. They can do this directly, taking over many of the detailed administrative tasks which heads too often do themselves, as well as some of the leadership functions which in a successful school are shared by staff rather than resting solely with the head.

Bursars can also offer heads other kinds of support – such as advice on remodelling the school workforce and developing the role of support staff. And precisely because most bursars have a different perspective from colleagues who have trained as teachers, they can be a useful sounding board to test new approaches, and indeed put forward solutions themselves.

For a Headteacher’s perspective on the bursar role in effective school leadership, see Annex 3 (pages 29 to 31).

Bursar Modular Job Description

The modular job description which follows is designed to help when drawing up a job specification, reviewing an existing post or advertising a new one.

The description is divided into sections as follows:

- STRATEGIC ROLE
- FINANCE
- PERSONNEL MANAGEMENT
- ESTATE MANAGEMENT
- WHOLE SCHOOL ADMINISTRATION
- MARKETING

It is expected that all bursar jobs will broadly cover the functions set out in the Strategic Role section. For all other sections, whether specific functions are included in the job specification will depend on the circumstances of the particular school. In other words, schools should be selective in deciding which functions will be relevant for the type of bursar they need, and should adapt the wording of functions as needs be. *Nothing in this document should be taken as mandatory, or limiting what can be done – it is offered as advice based on developing good practice.*

All bursar posts have management responsibilities, and it is increasingly becoming the norm for bursars to be members of Senior Management Teams. Whether bursars undertake all the tasks in this document personally or delegate them to other support staff, their senior management responsibility remains.

CORE FUNCTIONS: ALL SCHOOLS

Strategic Role

The bursar will normally be responsible to the Head as their line manager and it is usually appropriate for them – if they are playing a significant strategic role – to be a full member of the Senior Management Team (SMT).

- I. To be responsible for strategic planning aspects including all financial implications and ensuring that the school makes the best possible use of resources available.
- II. To be responsible for all or the majority of the disciplines of Finance, Personnel Management, Estate Management, Administration, all general Training and Development of staff, and all matters within the management of the school which are supportive to, but do not involve, the teaching function.
- III. To be responsible for effective 'Risk Management', for example, in Health and Safety and in the management of any third party service contracts.

VARIABLE FUNCTIONS: ACCORDING TO INDIVIDUAL SCHOOL NEEDS

The following three tables cover Finance; Personnel Management; Estate Management; Whole School Administration; and Marketing.

TABLE 1	Finance	Personnel Management	Estate Management	Whole School Administration	Marketing
Basic Functions	Improving school resource management by – 1.1 Budgets/ Monitoring/ Financial reports/ Payroll 1.2 Cash Management 1.3 Securing funds to which school is entitled	1.4 Recruiting and Managing Support Staff	1.5 Basic Premises management 1.6 Health and Safety management		

FINANCE – IMPROVING SCHOOL RESOURCE MANAGEMENT:

- 1.1a To advise the Head and Governors on investment and financial policy, preparing appraisals for particular projects and for the development of a business plan (long term financial strategy) for the future development of the school.
- 1.1b To prepare for approval by the Head and Governors the annual estimates of income and expenditure. To obtain agreement of budgets, and to monitor accounts against budgets. To prepare regular management accounts for budget holders and to report on the financial state of the school to the Governors.
- 1.1c To use financial management information, especially benchmarking tools, to identify areas of relative spend, assess trends and directly advise the SMT accordingly.

- 1.1d To be responsible for the management of the school accounting function, ensuring its efficient operation according to agreed procedures, and to maintain those procedures by conducting at least an annual review.
- 1.1e To monitor all accounting procedures and resolve any problems, including:
 - (i). The ordering, processing and payment for all goods and services provided to the school.
 - (ii). The operation of all bank accounts, ensuring that a full reconciliation is undertaken at least once per month.
 - (iii). Maintaining an assets register.
 - (iv). Preparation of invoices and collection of fees and other dues, taking legal action where necessary to recover bad debts.
- 1.1f To prepare the final accounts and to liaise with the auditors. To provide detailed management accounts for the Governors and Head according to an agreed schedule, reporting immediately any exceptional problems.
- 1.1g To be responsible for the provision of a comprehensive payroll service for all school staff, with operation of the various pension schemes and other deductions in which the school participates.
- 1.1h To prepare all financial returns for the DfES, LEA, and other central and local government agencies within statutory deadlines.
- 1.1i To be responsible for dealing with the school's rating assessment and VAT liabilities and advising on the financial implications of charitable status with respect to the current and any future tax legislation.
- 1.2 To maximise income generation within the ethos of the school.
- 1.3 To be the point of contact with central and other agencies with regard to grant applications, gifts and other donations.

PERSONNEL MANAGEMENT

- 1.4a To be responsible for general personnel matters. For the clearance for new staff – medical checks, child protection, and to issue contracts of employment. To give advice to Governors on assessment of salaries, expenses, sickness and maternity procedures, redundancy and other matters of dismissal. To attend at Employment Tribunals as necessary. To maintain confidential staff records and to ensure that staff records held in the school by others are kept confidential.

- 1.4b To provide leadership and guidance for support staff, including direct line management responsibility where appropriate – administrative and clerical, financial, technicians, medical, welfare and teaching assistants, premises and maintenance, ground staff, cleaners and caterers.
- 1.4c To be responsible for the recruitment, professional development, appraisal and training of all support staff.
- 1.4d To plan for, arrange and report on Staff Development aspects for all staff.

ESTATE MANAGEMENT

- 1.5a To be responsible for the maintenance of the school site and the buildings, the preparation of maintenance schedules and the efficient operation of all facilities on the property. Also for the installations and plant for lighting, heating, domestic hot water, cooking, ventilation, water softening, energy conservation etc.
- 1.5b In co-operation with the Fire Service be responsible for the installation and maintenance of equipment for protection against and escape from fire. To keep records of and to initiate regular fire practices and alarm tests. To ensure emergency procedures are current and timely.
- 1.5c To be responsible for the security of the school site.
- 1.5d To be responsible for the upkeep of playing fields, gardens, all weather surfaces, tennis courts and land drainage. To ensure the maintenance of boundaries, footpaths, roads and rights of way.
- 1.5e To purchase, repair and maintain all furniture and fittings.
- 1.6a To know about the main health and safety issues specific to the school and how they relate to students, staff, visitors and contractors.
- 1.6b To know what the elements of fire safety are and the associated risks to the school through the process of risk assessment.

TABLE 2	Finance	Personnel Management	Estate Management	Whole School Administration	Marketing
Inter-mediate Functions (additional to Basic Functions)	2.1 Securing bid-based competitive funds 2.2 Services contract management (catering/cleaning etc) 2.3 Insurance (inc. supply teacher cover)	2.4 All staff employment contracts, admin for teacher recruitment	2.5 Maximising lettings income 2.6 Premises strategy, services and contracts management 2.7 Effective Risk Assessment	2.8 ICT manager (Purchasing/contract management/ Liaison with LEA/DfES/feeder schools)	

FINANCE

- 2.1 To be responsible for securing bid-based competitive funds by effective use of bidding systems and contacts.
- 2.2a To negotiate, manage and monitor contracts, tenders, and agreements for the provision of support services. To purchase, either directly or indirectly, the school's energy supplies.
- 2.2b To be responsible for the arrangements for school facilities including: i) catering; ii) transport including the minibus(es) and drivers; iii) the school shop; iv) bookings for school facilities; v) provision of facilities for additional tuition out of school hours including music.
- 2.3 To be responsible for seeking professional advice on insurance and advising the Governors on the appropriate insurances for the school. Implementing the approved insurances, and handling any claims that arise.

PERSONNEL MANAGEMENT

- 2.4 To be responsible for all staff contracts and co-ordinate the administration for teacher recruitment.

ESTATE MANAGEMENT

- 2.5 To be responsible for the letting of the school premises to outside organisations and school staff, and for the development of all school facilities for out-of-school use, with particular reference to the local community.
- 2.6 To acquire and dispose of land and buildings as authorised by the Head and Governing Body. To draw up outline specifications for new buildings, obtaining tenders, obtaining planning permission, and liaison with building contractors and the school architect.
- 2.7a To know about risk assessment tools and how to use them to establish hazards within the school and the associated risk involved.
- 2.7b To be aware of the importance of a disaster recovery plan and its place within the management procedures of the school.

WHOLE SCHOOL ADMINISTRATION

- 2.8a To manage the administrative function including the administrative ICT facilities, school reception, reprographics, records and telephones.
- 2.8b To be responsible for the systems and general management of the school's administrative and financial computer network, the implementation of appropriate Management Information Systems and the full computerisation of the administration accounting and record system, including desk top publishing. Acting as System Manager for the administrative computer network.
- 2.8c To provide for the preparation and production of all school records and publications.
- 2.8d To maintain Pupil Records including when appropriate the Assessment Process.
- 2.8e To act as correspondent for the Department for Education and Skills and to be responsible for the records and returns required.
- 2.8f To be responsible for obtaining the necessary licenses and permissions and ensuring their relevance and timeliness.

TABLE 3	Finance	Personnel Management	Estate Management	Whole School Administration	Marketing
Advanced Functions (additional to Basic and Intermediate Functions)	3.1 Securing sponsorship funding	3.2 Advice on employment law	3.3 Implement Risk Assessment and loss prevention strategies	3.4 Advice to heads/governors on admissions 3.5 Relationship management (teachers/support staff)	3.6 Promoting school to parents, partners and local community

FINANCE

- 3.1 To be responsible for securing sponsorship funding using ‘commercial flair’ and developing contacts.

PERSONNEL MANAGEMENT

- 3.2a To advise the Governors on the policy needed to comply with legislation concerning employment protection, equal pay, sex discrimination etc. and the implementation of these policies in the school.
- 3.2b To formulate, monitor and implement the school’s safety policy to comply with the requirements of Health and Safety at Work Act and other legislation.
- 3.2c To act as the school’s Health and Safety Co-ordinator and Fire Officer.

ESTATE MANAGEMENT

- 3.3a To know the elements of a comprehensive disaster and recovery plan and operate the elements linked to the resource management responsibility.
- 3.3b To implement risk management and loss prevention strategies in the school to reduce insurance costs.

WHOLE SCHOOL MANAGEMENT

- 3.4 To provide advice to Heads and Governors on admissions and appeals policy; to develop a school admissions and appeals policy.

3.5 To act as a 'bridge' to facilitate closer working relationships between teaching and support staff.

MARKETING

3.6 To promote the school to different audiences and raise the profile within the local community. Liaise with local businesses for fundraising, arranging vocational experience and joint projects.

Annex 1

National College for School Leadership (NCSL) – bursar training programme

The Certificate and Diploma of School Business Management are exciting and innovative programmes for the development of bursars. They have been developed by NCSL as part of the Government’s strategy to increase the number of trained bursars in schools.

NCSL provides training, recognition and support for England’s school leaders. The bursar development programme forms an important part of NCSL’s work to build a coherent leadership development framework for schools.

CERTIFICATE OF SCHOOL BUSINESS MANAGEMENT (CSBM)

The course is aimed at practising bursars, including recently appointed bursars/school business managers, and those who have worked in schools in administrative and support roles. The course is also suitable for new entrants to the school management profession.

The CSBM is made up of seven modules:

1. The Educational Enterprise
2. Financial Management
3. Human Resource Management
4. Information and Communication Technology, Management Information Systems

5. Facilities Management
6. Risk Management
7. Administrative and Support Services Management

On successful completion of the CSBM participants will be able to:

- Illustrate and develop management decision making skills and manage resources more efficiently, effectively and sensitively
- understand the political, economic, social, legal and technological environment within which educational institutions operate
- enhance and renew their understanding of administration and management to evaluate the efficiency and effectiveness of educational institutions
- evaluate and analyse management strategies that support effective curriculum and learning development
- understand the nature of effective schooling in the 21st century

DIPLOMA OF SCHOOL BUSINESS MANAGEMENT (DSBM)

The course is aimed at experienced bursars in schools and managers from outside education who are looking to enter the education field. Candidates from schools should either be a member of their school Senior Management Team/Leadership Group, or working closely with them.

NCSL are running two DSBM pilot courses at the end of 2003. The content of programme, which will be refined and further developed during the pilot phases, follows extensive research and benchmarking, which has created a robust design blueprint to meet organisational, functional and personal needs. It includes professional and administrative skills training and will be fully and independently evaluated prior to national roll-out.

The DSBM focuses on the following areas:

1. Change management
2. Managing school improvement
3. Strategic management

On completion of the DSBM course participants will be able to:

- demonstrate an understanding of the complex and dynamic environment within which senior managers and leaders work
- identify and evaluate emerging trends in institutional management
- demonstrate self-management skills and develop an appropriate change management process
- successfully deliver the school's mission and demonstrate an understanding of quality management as a central feature of educational improvement

Course candidates and their headteachers have commented:

"What I have really enjoyed is being asked to challenge my accepted beliefs. I think I am far more adept at working with the local community and businesses than I was before."

"I'm now able to know how my skills can help improve the schools I work in. Being aware of what all the options are has been crucial to the quality of advice I can now offer."

"Her communication skills have improved especially in relation to parents... her on-lines skills and internet capability have improved as well..."

Both courses are fully funded for all maintained schools and open to suitable candidates with the support of their headteacher and Chair of Governors.

For more information see the NCSL website at <http://www.ncsl.org.uk/bursar> or email bursar@ncsl.org.uk.

Annex 2

Case Histories

A PRIMARY SCHOOL BURSAR

Sue Simcock, St Chad's C. of E. (C) Primary School, Pattingham

I am the bursar at St Chad's C. of E. (C) Primary School, Pattingham, which operates as a first school with a pupil age range of 4 to 9 (150 pupils). Although I have been in post for over five years, the last three have seen a radical change in my job description and responsibilities. I was originally appointed on a part-time basis with responsibility for pupil records and running the School Office and I was actually told on appointment that I may not always have enough to do, but as I was required to be there at to answer the phone and greet visitors and parents it would be alright to read a book. *This never happened!* However, at every opportunity I did try to take on more responsibility and to go on courses and it gradually became more than a full time job.

In January 2001, following the retirement of my former headteacher, I became the school administrator having the additional responsibility of managing the school's budget, School Fund and all personnel matters relating to staff. To enable me to carry out this new role there followed a rapid growth in my professional development. However, the training offered by my LEA mainly concentrated on the financial and ICT aspects of my role so in October 2002 I enrolled on the second pilot of the National College for School Leadership's new development programme for bursars, the Certificate of School Business Management (CSBM), which proved to be excellent.

I thoroughly enjoyed the programme and I recommend it strongly to other bursars/school administrators. All aspects of the bursar role are covered and it has made me far more aware of the political, economic and social environment in which schools operate. My knowledge, confidence and capabilities have increased enormously and I now feel able to evaluate and undertake management strategies more competently and manage resources in school more efficiently and effectively.

Following successful completion of the CSBM I became bursar for the school, which, **although comparatively new at primary level, is becoming more and more necessary with the increases in site-level resource management and devolved funding.** I am now able to relieve my headteacher of some of the increases in her workload brought about by this, leaving her more time to concentrate on the overall strategic development of the school. This has been particularly noticeable in those aspects relating to Facilities management, which prior to the CSBM I was unable to do other than at a basic level. My increased knowledge now enables me to represent her and the school confidently when discussing all aspects of the school's asset management and development with either the LEA or other outside agencies and to work with our Health & Safety Representative to ensure we meet current legislation.

I now have full management responsibility for Finance, Facilities, Personnel and Administration, including line management of all staff in these areas and I am joint systems manager for ICT with particular responsibility for the Admin Network. My enhanced role is also particularly relevant in light of the remodelling agenda and the "National Agreement" and an additional benefit has been that I have been able to raise the profile of all support staff in line with this and can advise on their deployment accordingly.

The most enjoyable part of the bursar's role for me has to be its variety. No two minutes are the same let alone two days, but I thrive on this. Some days I do feel that I have achieved things everyone else wanted me to achieve rather than my own expectations for the day and time management is one of the biggest challenges within the role, **but a major advantage of enrolling on the CSBM is that I am now a member of an online community of bursars.** This network allows me to source information and advice from colleagues in similar circumstances when faced with a particular problem in school. Somebody has

nearly always experienced it first and now that the programme has rolled out nationally there will soon be over 1000 members. With the ability to share information in this way, quickly and resourcefully, schools can only improve, although I am still wondering if I'll ever find the time to read that book!

“As the Head Teacher of a rural village primary school I feel very fortunate to have the expertise of a qualified school bursar as a key member of the school staff. The Certificate of School Business Management course has given Sue access to leading edge training, expertly delivered which has raised her self-esteem, knowledge and capability and our access in school to a qualified business manager.

*Her in depth knowledge of school systems such as finance, facilities, health and safety and personnel have **enabled me to be the headteacher I planned to be** – one with time to concentrate on maintaining high standards in teaching and learning, secure in the knowledge that the business management of the school is safe in the hands of our School Bursar”.*

Jane Nicklin, Head Teacher, St Chad's C. of E. (C) Primary School

For further information please contact Sue Simcock at: office@st-chads-pattingham.staffs.sch.uk

A SECONDARY SCHOOL BURSAR

Sharon Golze, Don Valley High School, Doncaster

I started work at the school in 1991 as bursar, mainly undertaking responsibility for finance and administration and supervising a support staff of approximately 12 people. This has now increased to 78 support staff, including administrative, technical, catering staff and teaching assistants. The role has evolved tremendously and can now be categorised into 5 main areas:

- Finance
- Administration
- Human Resources
- ICT
- Facilities

The school's budget, which is delegated directly to the school's bank account, has increased from just over £1m to over £5m. I am also responsible for the management of the finances of a City Learning College to open on the school's premises in September 2003.

The administrative support for teachers ensures that information is up to date and easily accessible. Communication with pupils, parents and the community is also provided. Several of the support staff take an active role in training and retraining teaching staff in the use of the computerised management information system. Personnel plays a large part in the role, both with teaching and support staff including salaries, personal issues and staff development. The support staff are all included in the appraisal system and are encouraged to undergo professional development. Many have or are involved with degrees, masters and NVQ courses. **More recently, I have become line manager for the 12 Teaching Assistants.** One of the Teaching Assistants is senior; she directs their time tables and works with the special needs co-ordinator. I regularly spend time in the class room observing them and have frequent meetings with them. **They are embarking on NVQ level 2 for Teaching Assistants. The school is a centre for NVQ and I am a qualified assessor, therefore I will be supporting and assessing their work for this qualification.**

I am the Systems Manager for the school, which entails providing ICT support for administration of pupil data, examinations, timetable, attendance and academic information. The collection and reporting of academic information at Don Valley High School is very important as all staff for a variety of reasons can access it. The role includes the collation of this data, making best use of the information it provides and producing reports. Both national and international data is used and staff are trained by myself and other support staff in its use. I have liaised with Doncaster LEA to provide access to both the academic and the curriculum side of the computer system, incorporating the use of the internet and intranet. I work very closely with the Site staff to ensure smooth running of the facilities of the school, in particular the hiring of the premises, health & safety and maintenance of the buildings.

In recent years, I have become a full member of the school's Leadership Team, comprising the Head and five Assistant Heads. **I attend all meetings and am included in all consultations and decisions of the team.** One advantage is that it enables me to receive

and contribute information at conception and use this information to improve administration throughout the school. I also attend the Governors Finance Sub Committee to report on the school's budget and the Full Governors. The role also includes membership of the School Improvement Team, contributing to improving all areas of quality in school.

The Head, Bob Johnson, has encouraged me throughout, introducing and supporting me in studying for and completing an MBA in Education Management; and when I became a course tutor on the first pilot of the NCSL Certificate of School Business Management course. The Head also conducts my own performance management reviews. **The support of the Head is crucial in recognising the value of the bursar role and developing it professionally.**

"Sharon's role is central to the smooth running of this large 11-18 Comprehensive School. She has a very important strategic role in the school and there is no doubt in my mind that the impact of a non teaching business manager on a school's progress can be immense."
Bob Johnson, Head Don Valley High School (www.donvalley.co.uk)

For further information contact Sharon Golze at: sgel@donvalley.co.uk

Shared bursar arrangements

The White Paper *Schools – Achieving Success* confirmed the Government's commitment to train 1,000 bursars by 2006. However, some smaller schools may not be able to afford to employ a full time bursar/business manager, even though their needs and responsibilities may be similar to larger schools. One solution to this problem is to share the services of a bursar among a group of schools.

A shared primary school business manager (SBM) programme

Opportunity Networked Learning Community, North Bristol Excellence in Cities Action Zone

Background

Opportunity Networked Learning Community consists of nine primary, one infant, one junior and one secondary school based in North Bristol. The zone came into effect from January 2002. The schools cover a diverse social and economical geographical area.

Problem

Observation and feedback from headteachers identified that a high percentage of heads time was spent on administrative tasks that they are not necessarily trained/equipped to perform efficiently and effectively. Headteachers were spending increasing amounts of time on administrative related tasks and attending courses to gain expertise in areas such as Health and Safety/Risk Assessment, Finance and Personnel issues. As a result time was taken away from heads being able to lead teaching and learning in their schools.

Solution

To provide professional administrative and management support to schools so that the headteachers are 'freed up' to focus on their main function – leading teaching and learning. After considering different options it was decided to appoint a group of primary School Business Managers (SBM). Each SBM works with up to three primary schools undertaking all SBM responsibilities within their allotted schools. However, each SBM has a different area of expertise which other members in the team can call upon to support the work in their schools. An advantage of this approach is that headteachers and governors will have one key person to work with.

The SBM job descriptions have been based on the modular job description contained in the 'Looking for a Bursar?' document – covering the 'basic' through 'advanced' modules. The Lead Business Manager also acts and line manager to the other SBMs.

Benefits to schools

- Headteachers focus on Teaching and Learning - impacting on pupils achievement
- Good support for Heads and Governors

- Headteachers have greater job satisfaction
- Recruitment of quality headteachers
- Recruitment of quality support staff
- Professional development for support staff
- Consistency of practice across schools
- Efficiency
- Financial savings – eg bulk buying, contract negotiation, accessing available funding streams, improvement to planning, monitoring and reporting of school budgets to achieve ‘Best Value’

Impact so far

The project is still in its early stages, but below are some examples of indicators of impact that have already been identified.

Quantifiable changes

- Water Company contacted as water costs seemed high. New water meter has been installed with probe to enable the water company to investigate possible leakage
- Identification of over £25,000 of ‘missing funds’ located on LEA suspense account
- Identification and retrieval of £8,000 threshold salary grant and supply costs not previously claimed from LEA/External funding sources

Qualitative changes

- Change of Practice – reduction in class management time by increasing understanding and usage of pupil data base
- Improvement in office practice and procedures particularly relating to finance
- The City Council is undertaking single status (job evaluation) review. SBM’s have been able to develop shared expertise to manage the process and explain it to the relevant staff. They have also been able to identify anomalies in the process and bring them to the attention of the LEA to reduce inconsistency and confusion
- Health and Safety – implementation of appropriate practice at an accelerated rate in comparison to how schools were implementing the initiative before the programme commenced

Headteacher comments:

"I feel that a real weight has been lifted from my shoulders"

"Just taking the Health and Safety files off my shelf, having them organized and an action plan put in place has been a relief"

"My SBM will keep me on the straight and narrow and I feel very reassured about the future management of the school"

"I have already noticed that I am giving more quality time to children and teachers in and out of the classroom"

For further details contact Clare Sanders at: opportunity_network@bristol-city.gov.uk.

Annex 3

A primary headteacher's perspective

Hazel Pulley, Headteacher, Caldecote Community Primary School

The school (480 pupils) is situated close to the city of Leicester on the outskirts of a large housing estate which is very deprived. The school is at the forefront of many local and national initiatives which are linked to raising standards, and is part of an Excellence in Cities Project.

Learning about leadership presents challenges! During the last two years whilst working for the NCSL as a consultant headteacher and Co-Facilitator on the New Visions Programme for Early Headship I have felt professionally challenged to review my own leadership practice. Through this stimulating interaction with a focused learning community and benefiting from time to reflect, the shape of leadership has been radically changed in our school. This has meant transforming structures and teams with a strong feature on empowerment, encouraging others to join in leading the school.

Apart from the senior staff I focused heavily on changing the role of the school administrator, widening the management opportunities in order to leave me time to focus on leadership practice. **The NCSL 'Certificate of School Business Management' course was pivotal to this change** and has helped transform not only the job description and work practice of the school administrator, now school bursar, but also the school office arrangements.

In order to symbolize our new school leadership practice **a more substantial bursar office was created and placed in the centre of the school. I do not need this office space to successfully lead the school, but the bursar does to support me through effective business management.** Having dispensed with a base altogether, I turned my office into a meeting room with one large oval table. The school bursar was invited on to our regular leadership team meetings held around the table, demonstrating the shared/distributed leadership practice now in place at our school.

Throughout this joint learning experience I have seen the capacity for leadership grow in our school. Roles and responsibilities now reflect broad involvement and collaboration and new processes and principles of leadership have enabled me to reach a situation where others are given and own the authority to lead and manage.

The impact for the School Administrator was substantial:

"I have now relieved the headteacher of her daily administration tasks which she has encountered in the past as well as some of her management workload, leaving her time to concentrate on the overall strategic development for raising standards and achievement for the school. I act as her personal assistant and we work and plan our time to suit the need of the school.

As Bursar, I am now a full member of the Senior Leadership Team, which I feel is important for my role, giving me the direction needed in managing the support services for the school, i.e. Financial, Human Resource, Facilities, ICT, Risk and Administration.

I feel that the role of the Bursar is versatile and no one-day is the same, the expectations are high and demands even higher, the role is challenging and the pace is always fast.

I would recommend the NCSL 'Certificate of School Business Management' course to other Bursars/School Administrators as a way of developing their skills and knowledge further and to help them understand the school as a whole, not just from the administration perspective. All aspects of the Bursar role are covered and it has made me far more aware of the political, economic and social environment in which schools operate. My knowledge, confidence and capabilities have increased enormously and I now feel able to evaluate and undertake management strategies more competently and manage resources in school more efficiently and effectively."

Kate Frith, Bursar, Caldecote Community Primary School

A Primary School model? Changes to our school expenditure and income with added creativity have funded this new position of School Bursar. Already within this financial year, having a more strategic financial element within our leadership practice has created many savings.

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