Flexible Site-based Management: implications for the emerging profession of school business manager

Draft

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Introduction

Since the devolution of management responsibilities to the school level at the end of the 1980s, school business managers or bursars have been increasingly used to manage the school's resources and work alongside the principal. Until 1998 there had been little research into this group of school resource managers but interest has recently grown in understanding their training and role in schools, particularly through lobbying by their professional body: the National Bursars Association (NBA), which, since its inception, has worked with its American equivalent body: the Association of School Business Officials to define its standards in order to map responsibilities, skills and continuing professional development. As a result, the government has funded the development of national professional training programmes and commissioned research into their role.

Nevertheless, the evolving role of this emerging professional group, their contribution to school business management and their training requirements are significantly under-researched and still a subject of exploration. This paper reports on a key aspect of a base-line study commissioned by the UK government to ascertain bursars' responsibilities, activities and qualifications at the outset of national training programmes and the school workforce remodelling initiative. It discusses the development of understanding about, and implications for the bursar's role, as an outcome of a longitudinal study of school bursars, using information from national surveys administered in 1999 and 2003 and supported by data from the National College for School Leadership. The paper considers responses to sections two, three and four of both surveys which explored bursars' responsibilities in schools and provided information about the breadth of the role, the levels of operation and relationships with governance bodies and management teams. It begins to explore the implications of role preference theory on an evolving role emerging within a turbulent environment.

Context

A new profession develops if there is a demand for its services, for example, the demand for nurses grew when the community was able to provide a better hospital service, and home nursing by the family became less desirable (Abel-Smith, 1960). Demand is usually influenced by public recognition of the skills held by the occupation alongside the nation's ability to pay for these skills. Since the 1950s, the public sector has been a prime site for the evolution of professions, due especially to the development of the state bureaucratic apparatus (Kirkpatrick, Whipp and Davies: 1996, Larson, 1977). Over the last twenty years, education in England has been subject to a turbulent environment of constant change and paradoxical decision-making leading to a growth in the numbers and types of support staff in schools. Whilst there has been a trend towards devolved site-based management which enables schools to make management and staff appointment decisions at the point of delivery, there has also been an increasing centralisation of curriculum and staff development training directives. These developments have purportedly occurred as part of a movement to improve standards in schools, and thus have been connected to increasing accountability and the publication of school league tables. During this period there has also been an increase in the use of information and communication technology that is impacting teaching and learning and as a result of a growth in consumer power there has been increasing competition amongst schools. Bursarship has evolved, therefore, during the 1980s and 1990s, in state schools, as a result of increased management responsibilities and bureaucratic activity in English schools.

Bursars have been established in private schools in England and Wales since these schools were founded, for example Winchester College's first bursar was appointed in 1394, but recognition of the role in state schools did not occur until principals and their assistants did not want to take on the responsibilities of school business management which had originally been carried out by the school business official at the district level. Assistant principals in particular were not always happy to take on this extended role 'I shall be seen as the bursar...and that's what I don't want' (quoted in Bowe et al, 1992:158). This view could be an indication that teachers did not want to move away from a teaching and learning role or that they believed that it involved a drop in status. Therefore, as senior teaching staff began to understand the scope and activities of school business management many felt that their priorities lay elsewhere, principally teaching and learning (Harrold and Hough, 1988, Markham, 1990, Bowe et al, 1992). Devolved funding and flexibility in determining staffing complements provided schools with the means and opportunity to respond to the concerns of their senior staff and non-teachers were appointed to a new role of bursar that had originally only been found in privately owned schools, thus increasing the number of bursars in state schools (O'Sullivan, Thody & Wood: 2000, Thomas and Martin: 1994). This new school workforce ranges in responsibility from a clerk operating under instruction from the district and often acting as the principal's secretary to an executive manager working alongside the principal with responsibility for multi-million pound budgets and managing all the school's resources (O'Sullivan, Thody & Wood, 2000).

In the early 1990s, as school business management was evolving in state schools, bursars were providing a financial administration service and more comprehensive financial information as well as supporting management of the budgetary cycle and negotiating contracts for the benefit of the school. They also took responsibility for property management and health and safety and insurance issues (Chastney, 1995; Thomas and Martin, 1996). In elementary schools during the mid 1990s, however, there were still many principals and assistant principals who were occupied with clerical work and management activities that could be the domain of the bursar. In 1996 it was reported that elementary school principals spent 42% of their time on management and 10% on clerical work (Funding Agency for Schools, 1998), for example, in some schools the head teacher would be preoccupied with budget, clerical work and appraisal issues and would delegate other clerical and management activities to their assistant principals. The list of activities carried out by assistant principals included selling sweat shirts, running sports days, putting out chairs, tidying the staff room and arranging residential trips, school visits and visiting speakers. (Webb and Vulliamy, 1996)

An outcome of schools' direct responsibility for managing their resources was that principals were accountable for any negative consequences of budget management, such as redundancies. Schools also had to take direct account of under-resourcing, making their own decisions about where priorities lay and increasingly taking account of value-for-money issues (Downes, 1997). In schools that employed bursars, therefore, it was general practice for principals to work with bursars on developing the school budget and for non-teaching work to be transferred from assistant principals to the bursar (Wallace and Hall, 1994; Thomas and Martin, 1996) Assistant principals would then take responsibility for curriculum, pastoral and community activities (Bush, 1995). It is perhaps due to this working relationship with bursars that high school principals spent 53% of their time on management but only 7% on administration activities (Funding Agency for Schools, 1998). Thus there was an imperative, not only to administer the school's budget, but to manage and optimise the school's fiscal, human and physical resources and to develop an administration that would provide useful marketing information as schools became more entrepreneurial in their activities.

Government involvement in the development of bursarship developed out of a recognition that teachers were spending too much time on non-teaching activities. Before 2000,

however, apart from the annual statistics, there is only one document that mentions bursars by name. The Green Paper: 'The Imperative of Modernisation': 1998, suggests that using bursars is one element, amongst others such as more effective use of technology, which would help reduce the bureaucratic burden for teachers. After 2000 there is evidence of increased awareness of the role of the bursar by central government. A search of documents on the DfES website for the year 2001 reveals eight matches, plus links, to 'Governornet' (an online reference service for the school council) and to the newly formed National College for School Leadership (NCSL) which launched the first pilot certificate programme for new bursars on 21st February 2002. These links include case studies, job descriptions and policies.

The bursar's contribution to national school development issues has also been officially recognised. In her speech of November 2001, Estelle Morris, the Secretary of State for Education includes bursars in her examples of those supporting school remodelling.

> That is why our proposals focus not just on the teacher's role but on the complementary roles that can and should be played by others in schools – like bursars, teaching assistants, technicians and learning mentors. In effect, we need to see a remodelling of not just the teaching profession but of schools, school staffing, school management and the use of Information and Communications Technology (ICT). (Estelle Morris, Nov. 2001)

She also asserts that principals and teachers will be supported by more trained bursars.

By 2002, many of the NCSL website links are related to the Bursars' certificate programme and DfES links are advocating the use of bursars to support governors' activities and to communicate policy changes such as Consistent Financial Reporting (CFR). The Value for Money Unit, in particular uses examples of bursar activity, provides a link to the NBA's web site and consulted with bursars about instigating CFR. 'We have also had input from schools and their representatives and have spoken to more than 100 bursars' (Value for Money Unit: 2002). The National Bursars Association has also been consulted, along with other organisations such as Local Education Authorities and unions, about a range of government documents or strategies. As expected, the main focus for consultation is related to financial resourcing of schools, although bursars' involvement in ICT in schools is recognised.

This increasing recognition, by the government, is impacting on the role of bursar during the introduction of the workforce remodelling initiative designed to reduce teacher workload, raise standards, increase job satisfaction and improve the status of the teaching profession. This initiative is restructuring the teaching profession and reforming the school workforce and has led to re-evaluation of staffing complements and teaching methods in schools. In particular, the numbers of support staff are increasing along with responsibility for their career prospects and training requirements (Teachernet, July 2004). As bursars are usually the senior member of support staff this initiative has consequences for their role, responsibilities, training and status.

Rationale

A new profession defines its role by developing 'its language, its ritual, and its uniform-its own body of traditions' (Abel-Smith, 1960:244). From this position it is then able to develop a monopoly base because 'only they can meet and perform the requirements of the profession' (Stratton, 2002:39). Emerging professions are thus in a state of turbulence where they are continually considering and resolving a range of issues related to responsibilities, training, status and entry requirements (Macdonald & Ritzer, 1988). For bursars, definition of role and status is particularly challenging. Although most schools employ a person to provide clerical support, the breadth of responsibility and levels of operation across schools make it difficult

to define this role. This is due to limited understanding, by schools, of how to make best use of bursars and also because each school adapts the role to their own requirements.

A monopoly of formal accreditation of expertise is also important (MacDonald *et al*, 1988; Glover and Hughes, 1996). When a new profession emerges, there is no agreed body of knowledge for which training can be developed and the low status means that educated entrants are unlikely to be attracted. Taking the clergy as an example, in the mid 1500s, at the parochial level, entrants were grammar school educated. Graduate entrants to the profession, at this time, had a greater opportunity for promotion and a degree conferred status within the profession. It was not until the early 1600s, when the hierarchy had been reforming the ministry, and local education facilities and university colleges had been established specifically for training ministers, that recruitment was overwhelmingly at the graduate level and the move towards a graduate profession had become self-generating (O'Day, 1979). The effect of this raising of standards is that a degree is required to enter the profession and it no longer acts as a distinguishing feature that ensures promotion. A degree, however, is no guarantee of vocational aptitude. Training for a profession encompasses initial training to develop the knowledge and skills necessary to perform the demands of the profession, but it is also important to ensure that members of the profession continue their development to remain current with the profession's knowledge base as well as developing new skills as they are required (Stratton, 2002). The final stage is to contribute new knowledge to the field whilst retaining basic knowledge in some areas and ensuring mastery in others (Glover and Hughes, 1996; Stratton, 2002). It is, therefore important for the profession to identify the knowledge and skills that define it and use experts in the field to enhance and develop it.

Professions do not evolve in a vacuum, in almost all cases; a formal working relationship has been established between themselves and the state that enhances their status (Fielding and Portwood, 1980). Often this relationship has been established after intervention by the state in their early development. An example of this is the battle for autonomy between chartered accountants and the state at the end of the 19th century when the state wanted to create public accountants who would be fulfilling their role. More positively, in the 16th century the Crown deliberately attempted to consolidate the clerical profession and encouraged theological studies at universities. In the 20th century the government intervened when nursing factions were warring over training requirements and made nearly every major decision in implementing the Nurses Registration Act even though a General Nursing Council had been created.

The relationship between profession and state is summed up succinctly by Abel-Smith (1960) who believed that the state should act as an agent of the community it represents to ensure professional conduct and the achievement of proper standards.

> The policies of professional groups are matters which concern the community as a whole. At its very least a profession represents a quasi-monopoly of labour services and as such the terms of admission to it raise questions of public interest. When a profession is given powers by statute, Parliament must watch to see that these powers are not used to the harm of other people. When the major employer of the profession is the state itself, government is inevitably involved in wider questions of policy.
>
> (Abel-Smith, 1960:240)

Theoretical Framework

Bursars are defining their role within an environment which is evolving as a result of constant government initiatives designed to focus the role of the teacher on teaching and learning rather than the clerical, management and leadership aspects of the role. As managers of the school's business in an emerging profession, bursars, therefore, must define their areas and

levels of operation and understand the competencies and skills required to discharge their duties. Topics that merit consideration in this turbulent environment include the change in competencies as the job evolves (Jirasinghe & Lyons, 1996), levels of performance (Dubin: 1974, Dreyfus & Dreyfus, 1986, Megginson & Pedler, 1992, Torbert, 1992) and the 'instinctive use of a role preference pattern' (Wells, 1997: 9).

There are many theories of role and learning preference that have developed over the last twenty years. Understanding of adult learning approaches and application has emerged as Kolb's (1971, 1984) learning cycle of experience, reflection, generalisation and testing which recognises the contribution that experience makes to our understanding, has been applied into Gregorc's (1982) individual learning approaches, Honey and Mumford's (1986) learning styles and action learning (McGill & Beaty, 1995) as vehicles for understanding and improving levels of performance. Thus, there is recognition of a learning and behavioural typology where preferences are exhibited based on concrete experience, conceptual thinking, and intuitive or experiential problem solving. The implication being that, not only would different individuals within the profession, work in different ways, but that they would also need a range of strategies to understand and develop their professional expertise.

Preferential behaviour approaches have also been developed as a result of increased understanding of how the human brain works. Herrmann's whole brain model (Herrmann, 1996) based on brain-based research and observable evidence of thinking styles suggests that there are four different thinking selves. These are: The 'A' Quadrant analyser (logical thinking, analysis of facts, processing numbers) e.g. scientist, the 'B' Quadrant Organiser (planning approaches, organising facts, detailed review) e.g. accountant, the 'C' Quadrant Personaliser (interpersonal, intuitive, expressive) e.g. mentor and the 'D' Quadrant Visualiser (imaginative, big picture thinking, conceptualising) e.g. entrepreneur. Thus, role and thinking style preferences contribute to the provision of alternative activities based on organisational needs. Herrmann suggests that mental preferences can both establish interests and lead to the development of competencies or lead to avoidance tactics in areas where competencies and motivation are low; implying that awareness of strengths and weaknesses can lead to the adoption of tactics to optimise performance.

Research into management and leadership roles provides an alternative viewpoint of where and how activity is focused in the organisation. Wells (1997) suggests that there are nine value driven roles for managing on the leading edge with each role providing a unique combination of leadership processes focusing on creating order, inspiring action and improving performance. These processes are compared against three further foci for managing effort of: systems, people and day to day task responsibilities. The outcome is a grid of role preferences that includes analytical, administrative, interpersonal and strategic tendencies. Amongst these roles there would be no hierarchy of importance but there would be overlap and interdependency which would require some degree of competence in other roles. He suggests that mastery of all roles is unlikely; however, any individual would possess strengths in more than one role and would be unique in their preference patterns. He also proposes that there is a tendency to work from strengths rather than to develop areas that are currently weak. The implication being that a manager should be aware of the problems that might arise from working to strengths only and should investigate how effectiveness might improve with a greater awareness of what the situation requires

Schwahn & Spady (2001) reviewed literature on leadership roles and discovered that there were five specific roles related to providing strategic direction, and aligning the strategy with the organisation. The Authentic Leader establishes a moral and philosophical foundation and is the lead learner, creating and sustaining a personal and organisational purpose and modelling the core values. The Visionary Leader supports the authentic leader in creating strategic direction. S/he is creative and future-focussed involving staff and stakeholders by defining and pursuing the preferred future, exploring options and retaining a client focus.

The Cultural Leader develops ownership by creating a healthy organisational climate and including people in the change process by creating meaning for them. Strategic alignment is achieved through the quality and service leadership. The Quality Leader improves personal and organisational productivity by developing and empowering staff, improving standards and results and evaluating performance whilst the Service Leader supports staff in achieving the mission by restructuring to achieve outcomes and rewarding positive contributions. Once again, there is recognition of roles within the organisation, although in this case they are proposed as desirable in order for the organisation to prosper within a turbulent environment rather than as a preference for the individual.

Finally, consideration must also be made of levels of understanding of the role. There are many models which discuss either awareness of performance of levels or of performance itself. Dubin (1974) discusses a cycle of unconscious incompetence, conscious incompetence, conscious competence and unconscious incompetence. There are two implications within the model, firstly that 'you don't know what you don't know' and that when there is awareness the size of the problem can become daunting; secondly, that when one is unconscious it is not possible to be aware of whether you are in a competent or incompetent state. Consequently, continuous professional development is necessary in order to question and improve on practice. There are many frameworks for levels of performance, some addressing the range of levels from novice to expert, e.g. Dreyfus & Dreyfus (1986) and others which propose competencies of leaders (Torbert, 1992, Rooke & Torbert, 2005). Whereas Torbert discusses the different approaches of leaders and so is more closely aligned to the work of Wells (1997), Dreyfus & Dreyfus explain levels of performance that develop from one of little situational perception and discretionary judgement to an intuitive visionary approach that does not rely on rules and only uses an analytical approach in new situations or when problems occur.

Thus there is a evidence that within a management and leadership situation managers will react according to preferential roles and that they should not only be aware of their preferences (Herrmann, 1996 and Wells, 1997), but that they should be aware of the types of roles required to lead and manage within a turbulent and changing environment (Schwahn & Spady, 2001). The roles demonstrate preferences for working with and developing people or systems, for visualising the future or tidying up the present and for communicating with and creating meaning for people in the organisation. Within these roles there are levels of expertise and performance that should be continually questioned and enhanced. Development should include strategies that take account of preferential behaviour (Ingvarson, 1990; Griffin, 2003) and self-management and self-knowledge (Eraut, 1993).

Methodology

In order to understand the roles and training requirements of bursars, a longitudinal study was initiated in 1997, starting with an indicative, multi-method pilot study based on a ideographic philosophy of placing 'considerable stress upon getting close tone's subject and exploring its detailed background and life history' (Burrell and Morgan, 1979:6.). As suggested by Cohen and Manion (2000), longitudinal studies are often associated with the word 'development' as they usually deal with human growth and this study has researched the evolution of the profession since 1997. As the research was focussing on the development of a new professional group in education, the three researchers involved in the initial project came to the field with no predetermined theoretical perspective (Glaser & Strauss, 1967) and the pilot study research design set out to explore a range of issues related to bursars including:

- Their career experiences and qualifications;

- Their role, activities and responsibilities as bursars;

- Their relationships with other school stakeholders;

- Their position with relation to the senior management team. (O'Sullivan, Thody and Wood, 2000).

Data collection and analysis took place simultaneously as data was constantly compared and defined in sufficient detail to generate theory. Data collected came from interviews, observation, job descriptions, application forms and a survey of training programmes offered by local education authorities, colleges and universities. The breadth of data provided a means of exploring variations and initial validation was carried out by sharing the findings with bursar focus groups and through an opportune study of good practice in school bursarship carried out for the Teacher Training Agency which used a sample of expert bursars working in high performing schools. Thus after exploring responsibility areas, levels of operation, career, training, skills and relationships with senior managers and governors a theory emerged that related bursars' levels of operation to the school's level of autonomy and suggested an emergent theory of three ideal types of bursar (O'Sullivan, Thody and Wood, 2000) (see page 13).

At the start of the second phase of the study, there was an understanding of why bursarship had evolved, what the bursar's role involved, their career route and qualifications and the levels at which they operated. The data for the emergent theory, however, had been gathered from expert bursars who were unlikely to represent the range of all bursars. The theory had also been developed as a result of convergent thinking related to the breadth of data available. At this stage, therefore, a national survey was administered that would sample the whole bursar population in England and Wales. This approach facilitated further investigation into the emergent theory, the addition of more categories and the exploration of relationships amongst the data. In 1999/2000, therefore, a national survey of school bursarship was undertaken to explore bursars' careers, qualifications, responsibilities, relationships, levels of operation and skills and attributes. The questionnaire was devised using the outcomes of the 1997 indicative study and taking account of the national standards, codes of conduct, skills and attributes developed by the National Bursars Association in collaboration with the US, Association of School Business Officials, International (Welsh, 2000). Thus the categories and theory identified in the pilot study informed the development of the first national survey questionnaire, e.g. leading to the incorporation of a professional development section and a differentiation in the levels of operation in the responsibility section. During this phase, the data were checked against the emergent theory, and owing to the larger samples it was possible to address concerns of generalisability that had naturally arisen during the indicative pilot phase, thus further advancing the theory.

The subsequent questionnaire developed in 2003 applied understanding of the bursars' emerging professional roles and responsibilities developed from data analysis of the first survey and during the evolution of the national certificate and diploma programmes. The second survey was timed to capture bursarship during the early stages of workforce remodelling and the national professional training programmes. It included more detailed school funding, career and roles and responsibilities sections.

The randomly generated sample for both surveys included English, Welsh and private schools and all city technology colleges. A 20% random sample was taken of the smaller numbers of high and large elementary schools and a 5% random sample of special schools and the larger numbers of small and medium elementary schools. The sample totalled 2755 and of these 1198 replied giving a response rate of 43%. The 2003/4 survey used the same sample as the 1999/2000 survey. Of these 607 replied giving a response rate of 22%.

Further illustrative data used in this paper is taken from searches of government documents and government and National College for School Leadership websites and is used to

contextualise the history of the development of the profession and the outcomes of professional development.

Results

In 2000, the survey indicated that 64% of state schools employed bursars. In 2004, the percentage had risen by 4% to 68%. Job titles provided an indication of which staff in the school felt that they carried out the bursar's role and of the range of roles. As expected in an emerging profession, both surveys indicated that over 120 job titles are assigned to this role with a generic (bursar) and management-level (SBM) title dominating. There are also many instances of combined job titles e.g. 'Administration & Finance Manager' indicating that the role has not been rationalised. In 2000, seventeen principals felt that they were carrying out the bursar's role. Four of the titles that occurred most often included the administration role and only two included the term 'finance'. If the level of activity is examined: there was one assistant level, three officers and three managers. The term 'bursar' (of which there was the highest number) is generic, as is 'secretary', and therefore, the level of activity could not be ascertained for these titles. In 2004, the percentage with the title 'administration officer' is halved and the numbers with the title of 'administration assistants' has fallen. Two principals (both female) completed the form. Chart 1 indicates that if titles of men and women are compared, 'administration' titles are widespread for women (22%), but are hardly used for men (4%).
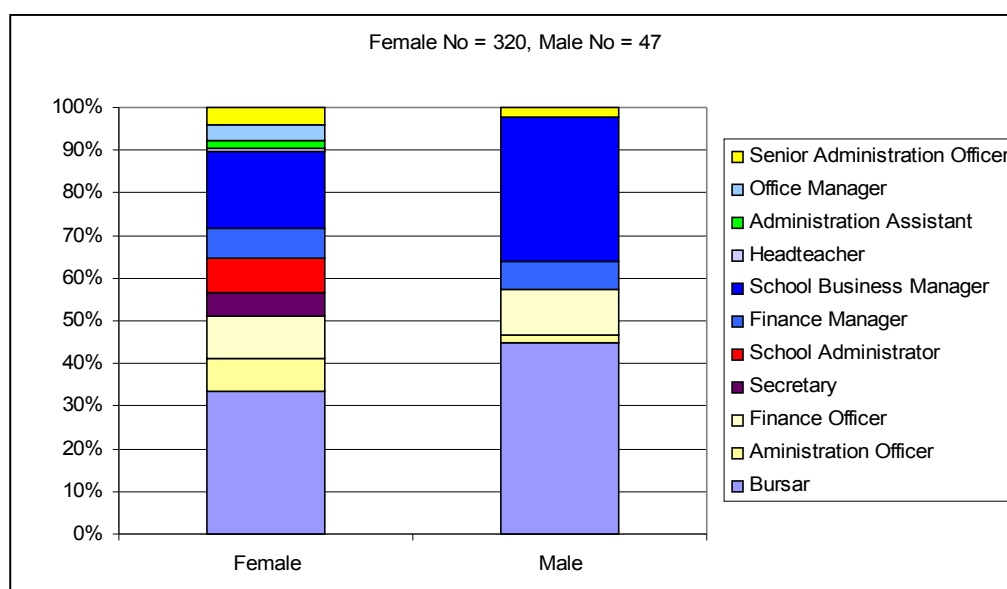

Chart 1: Most Common Bursars' Titles (2004)

There has been little movement in the percentage of bursars working in the different phases and types of schools over the four years from 2000 to 2004. The 2003/4 survey asked respondents who ticked the 'no bursar' box to complete the first section, thus providing data about the type of school that did not employ a bursar. It was, therefore, possible to gather information on the percentage of school phases/types that did and did not employ a bursar. Unsurprisingly 83% of those schools without bursars were in the elementary phase. Chart 2 clearly shows that almost all high and middle schools had a bursar. Just over half of elementary phase schools and two-thirds of special schools had bursars.
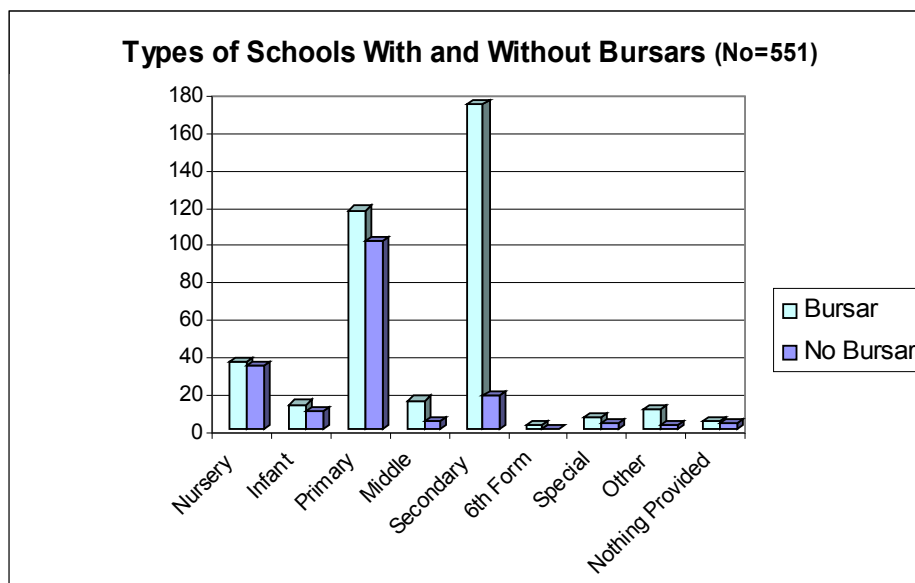
Types of Schools With and Without Bursars (No=551)

Chart 2: Bursars According to Schools Type (2004)

Gender

Bursarship is characterised by a high percentage of females in the role (Chart 3). In both 2000 and 2004 there were more than 80% of females in post (81% in 2000 and 82% in 2004).
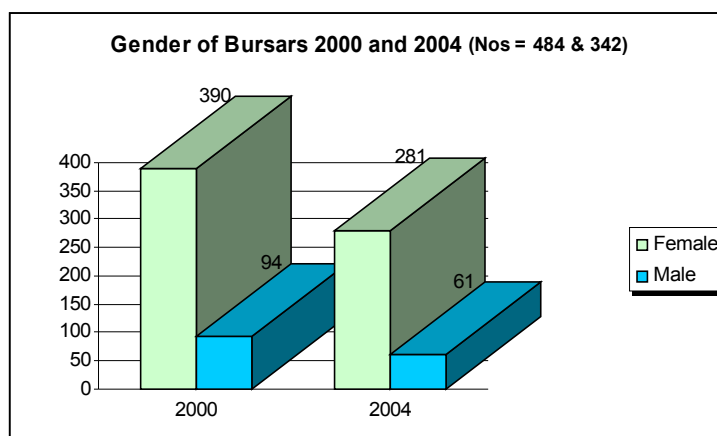
Gender of Bursars 2000 and 2004 (Nos = 484 & 342)

Chart 3: Gender Split of Bursars: 2000 and 2004

Age

In 2004, almost half of both male and female bursars were in the 46-55 year age group (48%). A further 15% were at, or close to retirement age (Chart 4). These percentages have increased since 2000 when they were 47% and 12% respectively, suggesting that the trend is for adults in late career to become bursars, or that in general, bursars stay in post until they retire. The percentage under 35 has reduced from 8% to 6%. An implication of this aging population is that there will be a constant turnover of bursars as they reach retirement age or retire through ill health.
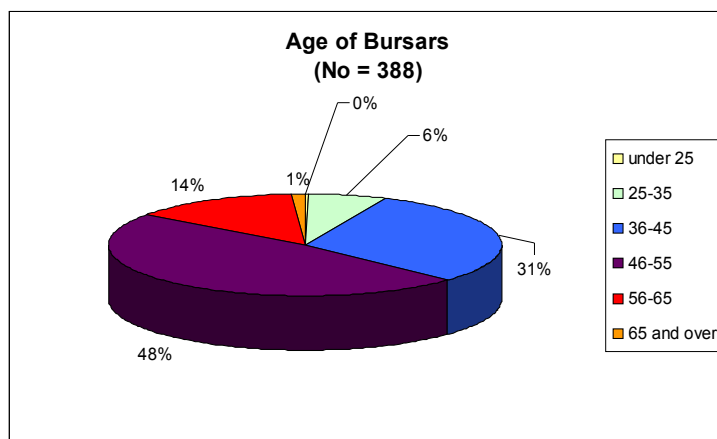
**Age of Bursars
(No = 388)**

Chart 4: Age of Bursars According to Gender: 2004

Qualifications

In 2000, there was no minimum qualification level required to become a bursar. The highest qualification held by 52% of bursars was obtained at school, 18% obtained their highest qualification at further education (FE) level and 30% had obtained their qualification from higher education institutions (HE). Thus more than half of those claiming to carry out the role of the bursar had no academic qualification beyond the school level and almost three quarters of bursars held qualifications no higher than Advanced Level/Higher National Certificate/Diploma (A- level/HNC/D).

When comparing male and female academic qualifications in 2004, 34% of female qualifications were at General Certificate in School Education/Certificate in School Education/Royal Society of Arts (GCSE/CSE/RSA) level, with A Levels and degrees as the next most frequently held qualification at 16% (Chart 5). 40% of qualifications were gained at school, 24% at Further Education level and 20% through Higher Education. Almost 30% of men had degrees with GCSE/CSE/RSA (18%) and masters (14%) as the next most frequently held qualifications. 35% of qualifications were gained at school, 9% at Further Education level and 43% through Higher Education. These findings indicate that, in general, male bursars are better qualified than female bursars. For those with qualifications gained after compulsory education, most women acquired theirs at FE level whereas men acquired them at HE level. Qualifications levels have increased overall with more bursars holding degrees and masters qualifications.
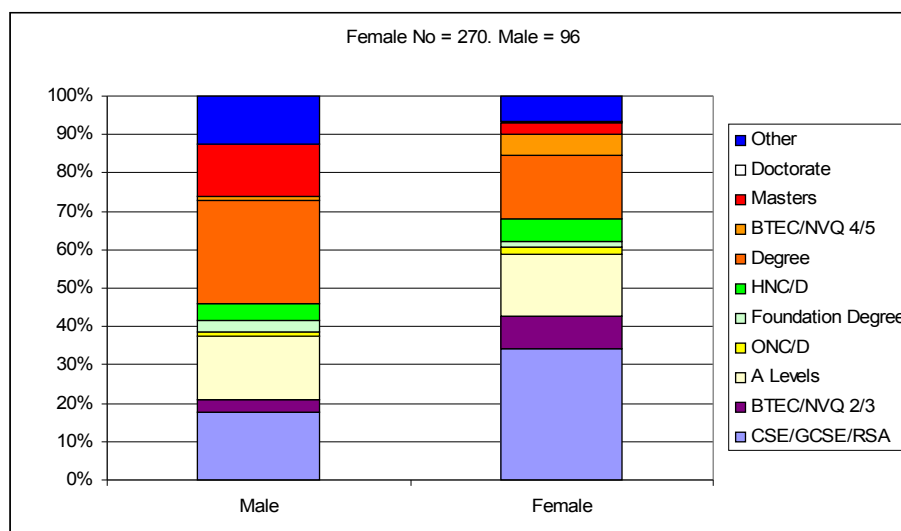

Female No = 270. Male = 96

Chart 5: Highest Qualifications (2004)

Bursars hold a wide range of professional qualifications and so, for analysis, they were grouped according to the modules of the Certificate in School Business Management (CSBM). Specific bursar and teaching qualifications are recorded separately. In 2000, accounting and financial qualifications comprised the largest single percentage of professional qualifications, followed by secretarial qualifications. In 2004, the pattern was still the same, although secretarial qualifications were grouped into the business and administration category (Chart 6). There is a greater similarity between male and female professional qualifications than between their academic qualifications, however, men are more likely to hold facilities qualifications and females are more likely to hold ICT qualifications. None of the men surveyed holds a specific bursar qualification.
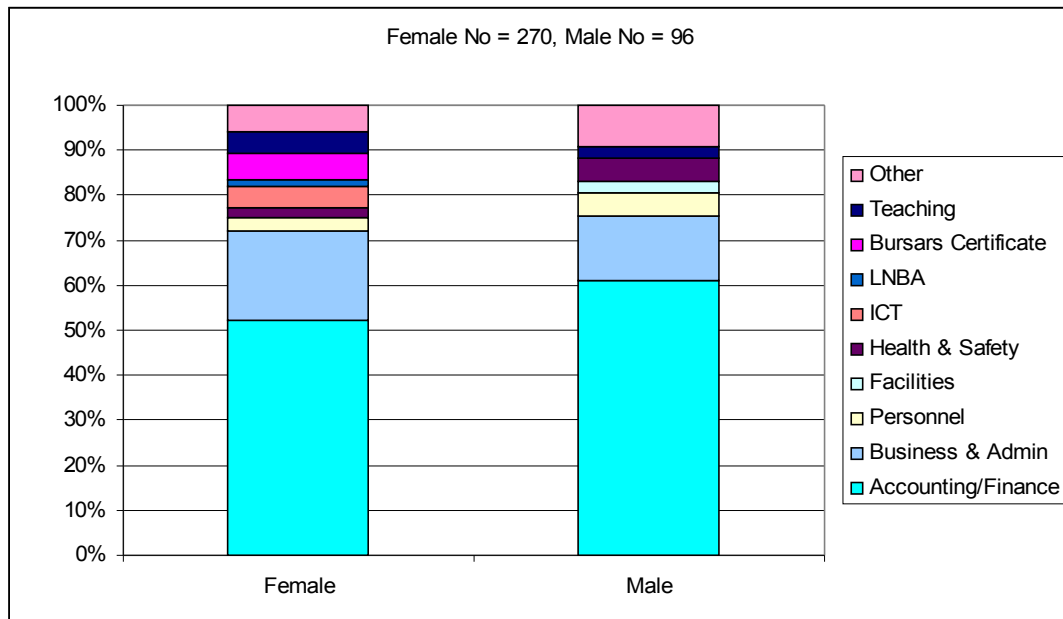

Chart 6: Professional Qualifications (2004)

For too many bursars, and particularly women, their highest academic qualification was obtained at school, although the percentage is reducing and there has been a growth in the numbers who hold degrees and masters level qualification. One bursar in the sample holds a doctorate. In general, men are better qualified than women. The highest percentage of professional qualifications centres on accounting/finance and business and administration. Men are more likely to hold facilities and health and safety qualifications (possible growth areas) whereas women hold ICT and bursarial qualifications. Details were not gathered about the ICT qualifications, but they are likely to be related to using specific programmes and databases rather than systems management.

Responsibilities

Although bursars are associated with financial management, both surveys confirmed the earlier indicative study findings that this responsibility accounts for less than a third of their overall responsibilities (27% & 26%). The balance amongst the responsibility areas is equalising with a hierarchy emerging (Charts 7 & 8):

- Financial and administrative management which includes marketing;
- Human resource and facilities management which includes support services;
- ICT/MIS and risk management.
- Learning and teaching.

The hierarchy of responsibilities reflects the professional qualifications held by bursars.
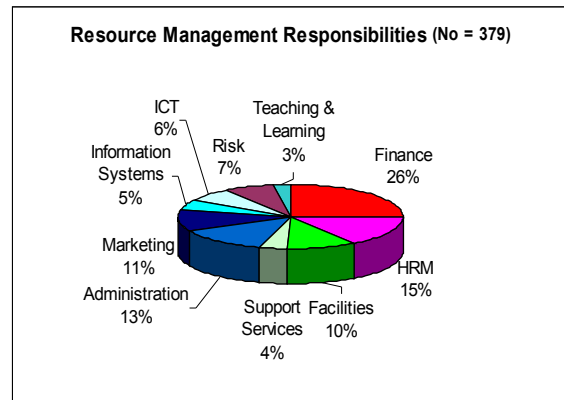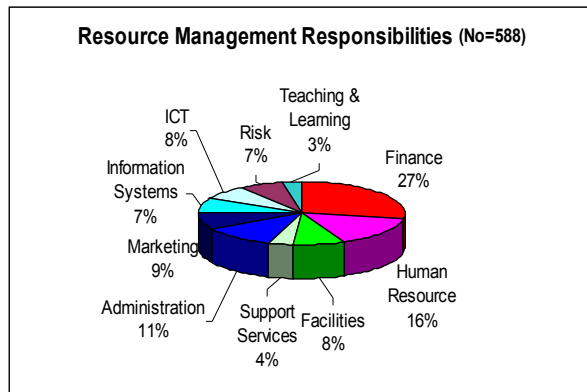
Charts 7 & 8: Resource Management Responsibilities of Bursars (2000 & 2004)

There has been an increase in the percentage of administration responsibilities, from 20% to 24%. A further possible trend is the reduction in responsibility for ICT and information systems: from 15% to 11%.

Activities

The main activities that bursars perform themselves and supervise within each responsibility area are presented in Table 1. They have not changed between the two surveys. Common main activity themes are record keeping and the provision and maintenance of basic services and resources for the learning environment. Most of the activities are at a clerical level, although unsurprisingly financial activities are at a management level. Bursars are also managing contracts: an activity that had already been identified as a specification often occurring in their job descriptions (O'Sullivan, Thody & Wood, 2000).

	Perform Myself	**Supervise**
Financial Management	Manage the budget	Manage cash, investments and credit control cycle
Human Resource Management	Keep accurate staff records	Keep accurate staff records
Facilities Management	Ensure the continuing availability of supplies, services and equipment	Keep records of equipment, furnishings and school maintenance programmes
Support Services Management	Manage school support contracts	Ensure the adequate and efficient provision of food services
Administration	Prepare and produce records and returns	Maintain pupil records
Marketing	Maintain positive relationships among all members of staff	Manage marketing matters
ICT	Develop the school's computerised administration system	Keep records of computer hardware and software
Information Systems	Participate in strategic planning	Manage information and communication systems
Risk Management	Ensure conformity with health and safety legislation	Ensure the safe maintenance and operation of all buildings
Learning and Teaching	Keep accurate records of learning resources and equipment	Keep accurate records of learning resources and equipment

Table 1: Main Activities Performed by Bursars in Each Responsibility Area (2000 & 2004)

Levels of Operation

Administration, (clerical in the US), management and leadership levels of operation were investigated in order to test the ideal types that had evolved out of the indicative study (see page 7) and to understand how the balance of operation contributes to the autonomous school working within an environment of accountability and continuous government initiatives whilst focusing on standards. The indicative study had shown three types of bursars operating at three different levels depicted by a triangle (administration reducing through management to leadership), an inverted triangle (mainly leadership reducing to administration) and a diamond (mainly management with lesser amounts of administration and leadership) (Figure 1). In this case, administration is defined as routine work, management as decision-making and supervision and leadership as strategic thinking and policy-making (Sawatzki, 1997, West-Burnham, 1997).
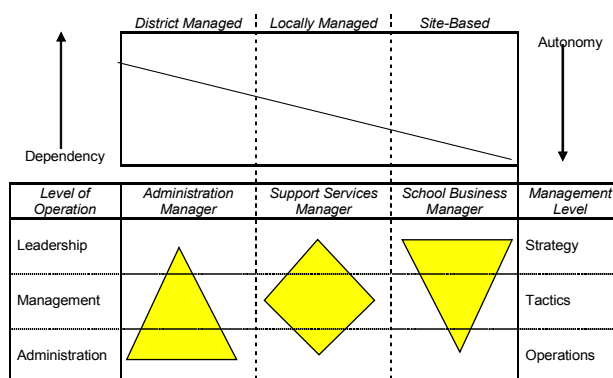

Figure 1: Levels of Autonomy for Bursars

When bursars' levels of operation were aggregated, 60% of bursars' operated at administration level, 27% at management level and 13% at leadership level. These figures, however, do not reflect how bursars operate in their own schools. Data from the resource management section of the questionnaire were, therefore, analysed for the nine administration, management and leadership variables (Table 2).

Levels of Operation	Shape	
A = M = L	Rectangle	
A = M < L	Funnel	
A = M > L	House	
A < M < L	Inverted triangle	
A < M > L	Diamond	
A < M = L	Pants	
A > M > L	Triangle	
A > M < L	Hourglass	
A > M = L	Chimney	

Table 2: Shapes of Styles of Operation for Bursars

The resulting analysis suggested that although nine types are possible, there are four preferred types operating in schools. Two types reflect a focus on administration (45%). The

increase in importance of administration could be borne out by the emphasis on record keeping in the activities. The third mainly management type reduced in occurrence between 2000 and 2004 from 20% to 12% (Table 3). This reduction could be due to an increase in the final management/leadership type from 11% to 22% which might indicate that, where administration was not a major concern for the bursar (probably because they supervised others), then the movement has been towards an increase in leadership, rather than a consolidation of management activities. The fall in the percentage of bursars with a management-focus could also be an indicator of the success of removing administration work from the principal and/or could indicate the growth in data rich but information poor schools and an over-load of work at the administration level that might be remedied by more streamlined systems and processes.

Shape	2000	2004
Chimney	20%	24%
Triangle	24%	21%
House	7%	9%
Hourglass	11%	3%
Diamond	20%	12%
Rectangle	3%	3%
Pants	11%	22%
Inverted Triangle	2%	3%
Funnel	2%	3%

Table 3: Styles of Operation for Bursars 2000 & 2004

In 2004, when the data from the second survey was examined for male and female differentials, 70% of females operated at a mainly administration level whereas 70% of males operated at management or leadership levels.

Levels of operation can also be inferred from how School Business Managers work with decision-makers, i.e. senior management teams (SMT) and Governing Bodies (US, School Councils). Analysis of responses to questions related to membership of the SMT in 2000 and 2004 indicated that more than a third of bursars had no contact with SMTs and supported findings that bursars are concentrating on administrative and clerical work at the expense of management and information providing activities. Encouragingly, however, almost a quarter of bursars were full team members and the rest attended when required, advised the team or were members of other management groups. The relationship between bursars and their Governing Bodies appears to be better developed than with SMTs. In 2000, over a third of bursars advised, and approximately a quarter were members of the Governing Bodies or its committees. However, 18% of bursars also had no formal relationship with the Governing Body. By 2004 the number who had no formal relationship had fallen to 9%.

Attributes and Skills

Attributes were included in the 1999/2000 survey and only removed from the 2003/2004 questionnaire because of limited space. The attributes that bursars feel are most essential are left-brained characteristics of honesty (532), reliability (521) and efficiency (520). These are all attributes that would be important for budget managers and record keepers. The next most essential attributes are related to commitment and communication and are possibly

comments on what it feels like to be a bursar working in a school. Bursars felt that they should be hard-working and flexible (500), committed to the school (482) and self-motivated (469). The final most essential attribute was effective communication (469). The attributes bursars felt were unnecessary to their role were at opposite ends of the same spectrum, namely unassuming (205) and charismatic (217) implying they should hold the middle ground. The most desirable attributes were right-brained characteristics. These were that they should be intellectual (317), creative (283) and person-centred (270).
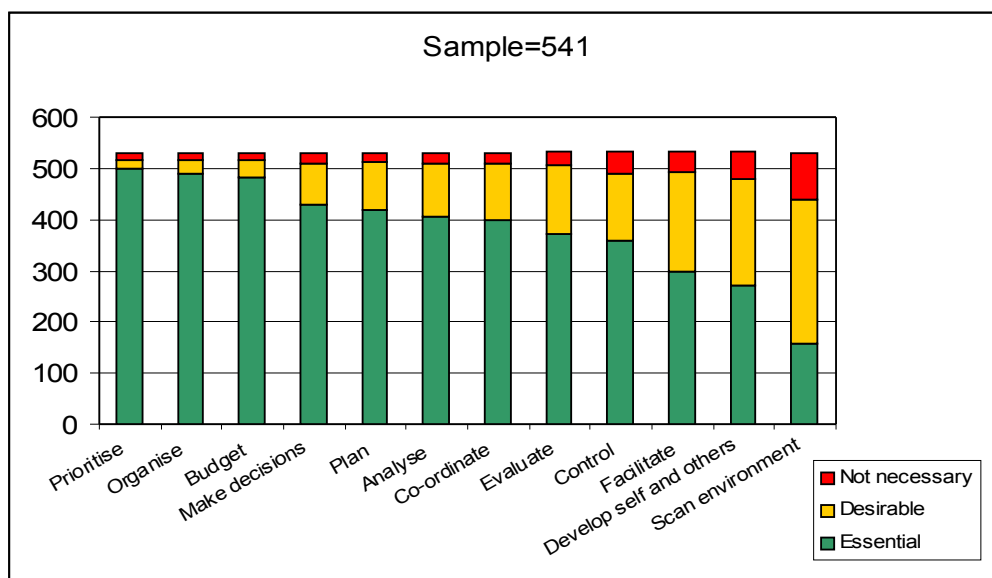

Chart 9: Bursars' Styles of Operation (2000 & 2004)

The management skills deemed most essential were budgeting (484), prioritising (499) and organising (488), indicating a focus on finance and managing the pressure of work. The most desirable skills were also those that were amongst the highest scoring of the 'not necessary' group. They were: scan the environment (281); develop self and others (207) and facilitate (193). These are all skills that require self-motivation, confidence and awareness of the educational environment.

The data indicates that this emerging profession is characterised by a majority female population who operate at mainly administration level and whose highest qualification was obtained at school level. Men in the profession operate at a higher level and hold higher qualifications. The majority of bursars are aged over forty. Professional qualifications held by both males and females are comparable. Responsibility areas are diverse with specialisation depending on the needs of the school. The focus on administration and record-keeping, ensures schools are rich in data. There is, however, also an indication of overload perhaps resulting in many not turning this data into information and sharing it with school decision-makers. Bursars are now working closer with Governing Bodies; if they develop a positive working relationship with SMTs, then the focus on management information might improve.

Implications

Schools are constantly changing and must respond to government initiatives and the environment in which they operate. A flexible approach to school leadership, management and administration is required to operate within a changing world where site-based decision-making operates alongside increasing accountability within a quality, child-centred environment. Focusing on clerical work will not support the school's core purpose, nor will building inflexible systems enable the school to respond to its environment, but there are times when such a mode of operation would be important. For example, when a school is

failing, it requires an emphasis on administration and management to ensure processing, interpretation and evaluation of data. Alternatively, a school in transition requires management support in the form of flexible systems and support staff leadership that interprets changes in a meaningful way and plans development accordingly. If bursars are to contribute positively to school development their mode of operation within the school must evolve accordingly. It is important they understand their role and responsibilities and the impact of their activities inside and outside the school.

The data has indicated that there are nine possible levels of operation for bursars and a range of skills and attributes that must be taken into account in order to understand role preferences. When assimilated into the conceptual framework discussed earlier in the paper it is possible to interpret the role preferences as shown in Figure 2. The synergy between the models provides an approach for interpreting responsibilities and behaviour dispositions. This approach addresses the administration, management and leadership roles required to invent and describe the school's future and develop and apply systems, structures and procedures which enable vision to become reality whilst contributing to a quality service provision.
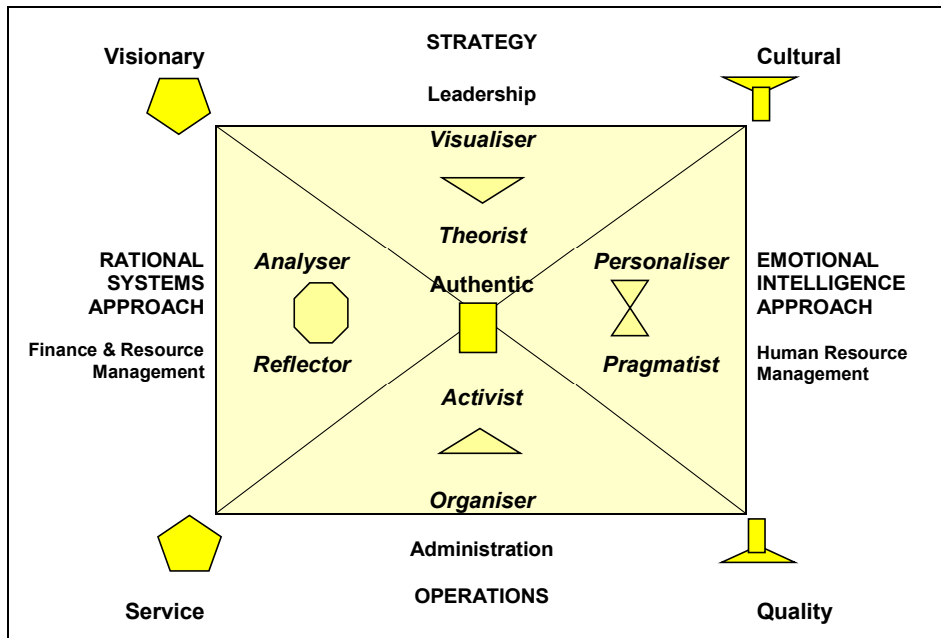

Figure 2: Interpreting Roles, Responsibilities and Behaviour Dispositions

Training and development for this diverse, aging group had to address the consolidation and understanding of the role required by those operating at an administration level and who have little situational conceptualisation of the range of their responsibility areas and of their own contribution to school management requirements. This group hold minimum level qualifications and many will not have studied in a formal setting for more than twenty years. They also needed to be introduced to the potential of the role. Alternatively, for those operating at management and leadership level, with higher formal qualifications, there was the need for a programme that challenged preconceptions, acknowledged the bursar as expert and incorporated reflective professional development. As the programme targeted adult learners it also required a focus on learning in the workplace and sharing of practice-based knowledge. Currently, the bursar training programmes also needed to address school workforce reform and the drive to reduce teacher workloads. The aims of the training programmes are summarised by the DfES as follows:

The courses will provide schools with qualified and highly professional financial and management experts who can play a key role in school management. They will take some of the pressure off heads and teachers so more of their time and expertise can be spent on teaching and school improvement. Consequently it has the potential to reduce the numbers of teacher leaving the profession because of levels of bureaucracy and workloads, and finally these courses open up a new career pathway and develop a labour market for existing bursars and new entrants to the profession.

(Tomlinson, N, 2004)

Initial evaluation of both the CSBM and DSBM indicates that there has been an impact on the work of bursars through increased knowledge and in-school project work that has led to more efficient and effective working practices (NCSL, 2004). This is summed up by the response of a principal to the improvement in performance of a bursar who had completed the CSBM programme.

I know the research she does on resources. She's hell bent on value for money since going on the course. We've got the best pencils in the world – they're triangular, you wouldn't believe the difference they've made to the children's writing. She impacts on teaching and learning without any doubt, by finding the best value so we've got more money to spend, as well as finding the right resources.

(Principal Infant School: 2004)

The impact on the principal's workload is illustrated by these responses to the change in working practices that have been brought about by increased understanding of the role.

"I feel that a real weight has been lifted from my shoulders."
"Just taking the health and safety files off my shelf, having them organised and an action plan put in place has been a relief."
"I have noticed that I am giving more quality time to children and teachers in and out of the classroom."

(Elementary Principals sharing bursars)

Although these quotations focus on bursarship at entry and administration level, a response by another bursar to the CSBM programme provides an insight into how a bursar operating at a different level can also benefit from the programme.

I was asked to speak at a remodelling event for Headteachers run by the LEA…One of the things I stressed was how the training received on the CSBM had definitely provided me with the knowledge, skills and confidence to develop the school's strategic financial planning. I could not envisage me having this level of responsibility and influence without it, and although I'm not sure I could see it at the time, one of the modules that has helped me most was the one on "Educational Enterprise". From this I developed a thirst for information realising the strategic influence this had. Reading and using the online communities and links, I am able to keep abreast of changes, which will impact on the school. (Bursar, Elementary School: 2004).

Issues for Debate

At this stage in the development of its profession, the NBA has had the support of the government and other trainers to improve its status and bursars are contributing to significantly reducing teacher workload. Their ability to contribute is being enhanced by the development of training programmes based on empirical research and supported by ASBO International. These training programmes identify and define the skills and knowledge that distinguish this professional group and provide the opportunity for expert bursars to contribute to new knowledge in the area.

> For the first time in my school career here was a training programme, which actively encouraged me to explore my potential. I was regarded with respect as a professional and I can still recall the insight and motivation engendered by the introductory talks. From the pre-course reading to the final assessment, I never stopped learning or growing in confidence.

(Bursar, Elementary School)

Bursarship, however, is evolving within a turbulent environment where their flexibility of approach and adaptability may be the keys to supporting successful schools. If the profession is to continue to evolve, there are questions that need debating:

- Should bursars adopt an increasingly clerical role or move towards leadership of support staff and information-sharing with decision-makers?

- How adaptable can the role be without fragmenting the professional group?

- Why, if clerking is increasing, is the profession being recognised at management level?

- As leaders of support staff and managers of the school's resources how can bursars complement the roles and attributes of SMT members?

- How is the development of national training programmes contributing to the development of the profession?

- With much external support in the early stages, how can bursars take control of, and responsibility for, their own profession?

It is apparent that the management of resources in an educational context will increasingly be professionalised leading to the identification of skills to frame the different levels and scope of school resource management. Input into the content of such skills involves examining the challenges of those already operating in the field in order to develop existing training programme blends.

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