

Section 1: Introduction

Use of the title ‘school business manager’ or ‘bursar’

- 1.1.** There are two preferred titles for this resource management role in schools. Within this report, the term ‘school business manager’ is used except where historically, the term ‘bursar’ is more appropriate and in the reporting of the national survey which used the term ‘bursar’ and the local authority survey where the term ‘bursar’ was searched.

Context of the report

- 1.2.** In 2004, the first baseline study of school business management reported on the characteristics of business managers; the schools in which they worked; their role and responsibilities; levels of operation; relationships; and professional development. The principal aim of the report was to provide information on business managers’ professional contribution and impact and to evaluate training requirements.
- 1.3.** Since 2004, there have been significant developments in curriculum provision, radical changes in approaches to children’s services, and the introduction of initiatives to improve the environmental and physical context of schools. This education agenda has had substantial resource implications in terms of school finance, staffing and facilities. There was a need to update understanding of the role of the principal resource manager in schools and to assess their impact and development requirements in order to ensure optimum provision of services. As a result, the TDA in collaboration with NCSL determined to investigate these and other issues by funding this second baseline study.
- 1.4.** Prior to finalising the methodology of this research study an initial scoping element was carried out, which consisted of interviews with representatives of major stakeholders in school business management. The scoping study revealed the following issues and concerns about the role and contribution of the school business manager:
 - i.** The potential of school business managers may not be fully realised as a result of lack of understanding of their role by key school stakeholders.
 - ii.** It is unclear how school business managers are promoting their role to other educational professionals.
 - iii.** School business managers are becoming a key factor in addressing headteacher succession planning in schools.
 - iv.** In larger schools a hierarchy of support staff is evolving, often with the school business manager leading a team of staff through appropriate appointment of specialist middle managers.
 - v.** The administration and management of data in schools is increasing and the school business manager is key to the interpretation and evaluation process.
 - vi.** There is a perception that the delivery of effective finance management in schools is variable.
 - vii.** Performance management of support staff is a key issue.

Terms of reference

1.5. Given the focus on school business managers as a resource to support learning and teaching in schools, it was determined that the following would inform understanding of the impact of the school business manager's role and their ability to support future government initiatives within the context of children's services:

- the monitoring of the school business management function, in terms of their numbers and titles
- the evolution of the role of the school business manager
- their effectiveness
- the identification of factors influencing their deployment

1.6. The principal aims of the project were:

- to explore how school business management is carried out in schools
- to assess the extent of any changes in the role of school business managers since the baseline study of 2003–4
- consider how this data might inform future thinking

1.7. In meeting these aims, the study addressed the following objectives:

- To explore and clarify the policy context and research requirements of the study.
- To gather and analyse data on the numbers, distribution, characteristics, role, levels of operation, relationships, responsibilities, knowledge and attributes of school business managers.
- To investigate the impact of national policy on the school business management function.
- To explore factors influencing the effectiveness of school business managers.
- To explore alternative deployment strategies for the school business management function.
- To investigate school business managers' training and development needs.

1.8. The collated data from the study provides the following background information on school business managers:

- i. Their characteristics including:
 - the number of school business managers in England
 - job titles
 - gender, age and ethnicity

- qualifications and training
 - previous experience
 - remuneration
- ii. The distribution of school business managers across different types of schools.
 - iii. The alternative models of school business management support that exist locally and nationally.
 - iv. The roles, responsibilities, skills and attributes of school business managers in their schools and the levels at which they operate.
 - v. The relationship of the school business manager to the headteacher, senior management team, governors, middle managers and other support staff.
 - vi. Training requirements as a result of the evolution of school business management.
 - vii. The contribution of school business managers in supporting policy initiatives and school operations, and factors influencing their effective deployment.

Structure of the report

1.9. This report presents the key findings from the research and is structured as follows:

- Executive summary
- Section 1: Introduction
- Section 2: The changing context of school business management
- Section 3: The school business management role
- Section 4: Understanding the role, responsibilities and relationships
- Section 5: Development of the profession
- Section 6: Conclusions and recommendations
- Methodology
- References
- Appendix 1: 2003 questionnaire
- Appendix 2: 2006 questionnaire