

# School Business Managers: their role in distributed leadership

How can SBMs/Bursars compliment  
and support distributed leadership

SCHOOL LEADERS

Report

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## Abstract

This paper explores the evolving nature of school leadership within the UK with particular emphasis on the role of School Business Managers (SBMs/bursars). Increasingly schools are required to be more business-like, requiring school leaders to acquire additional skills. Is it reasonable to expect head teachers to add the skills of running a business to the strategic and teaching skills they are already required to have? Would the idea of distributing this role, as is the accepted norm in businesses and in the independent school sector be an alternative route? SBMs/bursars have been performing this role in independent schools for decades with many state secondary schools following suit. However while there are distributed leadership teams, incorporating SBMs/bursars, across many schools, their uptake is patchy with head teachers, governors and senior leadership members not always being aware of all the potential benefits (source – discussion with DSBM graduates). This paper explores the uptake of SBMs/bursars across UK state schools.

## Glossary of terms

HAEC	Hockerill Anglo European College
LA	Local Authority
DfES	Department for Education and Skills
SBM	School Business Manager
CSBM/DSBM	Certificate and Diploma in School Business Management
NCSL	National College for School Leadership
SST	Specialist Schools Trust
DCSF	Department for Children, Schools & Families
SLT	Senior Leadership Team
NBA	National Bursars Association
TDA	Training Development Agency
TLR's	Teaching and learning responsibilities

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## Background

A number of factors are helping to raise interest in school business managers (SBMs)/Bursars within state schools.

### ***Changes in the nature of leadership in school, for instance***

- Awareness of the range of alternative school leadership models has increased, resulting in more schools adopting distributed/shared leadership models influenced by:
  - The increasing numbers of head teachers that will be retiring over the next 3 years, peaking at approximately 3500 in 2009 (research by the NCSL, sourced from DfES (based on Penstats data); McKinsey analysis).
  - 43% of deputies being unwilling to progress and 70% of middle leaders ruling out headship.
    - The largest disincentives for middle leaders being the movement away from the classroom/pupils (53%/48%) and the levels of stress (51%).
    - Deputies, already being a step away from the classroom and pupils, quote stress (44%) and personal commitment (42%) as the main reasons (source: as above NCSL).
- The publication of the PriceWaterhouseCoopers [2006] 'independent study into school leadership' also identified the need for increasing leadership capacity and highlights the potential contribution of SBMs/bursars in this respect.

### ***Changes in the level of support offered, for instance***

- The level of support offered by local authorities (LAs) to schools on 'core' business functions has reduced in recent years, in line with business and local government practice to flatten the organisational structure (McMillan 2002). This places greater emphasis on schools to develop their own capacity e.g. Cheque book accounting, DSFC financial standards in schools and Trust/Foundation Schools
- At the same time, there has been an increase in the professional development offered to SBMs/bursars:
  - Certificate in School Business Management (CSBM).
  - Diploma in School Business Management (DSBM).
  - The Licensee Bursar scheme operated by the National Bursars Association.
  - HE courses in School Business Management.

### ***External policy drivers***

- Increased pressure is being placed on all public organisations to demonstrate value for money, thereby increasing attention on approaches which can promote efficiency-based savings, e.g. the Value for Money unit at the Department for Children, Schools & Families (DCSF)  
[www.dcsf.gov.uk/valueformoney](http://www.dcsf.gov.uk/valueformoney)

- Other policy initiatives such as extended schools, personalisation of learning and Every Child matters, have increased the scope and demands on school leaders.

This paper aims to:

- Review the impact of these key drivers on school leadership.
- Evaluate distributed leadership research from an SBM/bursar perspective.
- Carry out a survey of what is happening across UK state schools.

Target audience

- Existing headteachers – how an SBM/bursar role might work in their schools to release heads to be strategic leaders (National Standards for headteachers 2004).  
*The National Standards for headteachers reminds us that "the effective head teacher develops a personal coherent model to fit the context in which (s)he is working".*
- Governing bodies – how SBMs/bursars can be instrumental in developing a balanced leadership team and highlighting their added value.
- Potential headteachers – identifying leadership models where the head teacher is able to concentrate on educational delivery.
- SBMs/bursars – giving them the tools to further discuss their role and to address the potential for distributed leadership.

## What are other researchers saying?

While the role of SBMs/bursars in distributed leadership has not been widely researched, significant research has been carried out into distributed leadership within schools generally, e.g. Davies (2005), Storey (2004), Oduro (2004) and Lumby (2003). The NCSL has developed a toolkit for schools to enable the implementation of distributed leadership using the HayGroup consultancy arm and Professor John MacBeath of the University of Cambridge. This toolkit can be used to test the logic for a distributed leadership team encompassing SBMs/Bursars via the use of the central pillars identified in the research (HayGroup for NCSL 2006)

- Self-confident and self-effacing headship - a desire to make an impact upon the world without a strong need for personal status.
- Clarity of structure and accountability.
- Investment in leadership capability.
- A culture of trust.
- A turning point.

### Pillar 1: Self-confident and self-effacing headship

Implementing distributed leadership across academic departments requires the head teacher to let go of tasks he/she has been trained to do. However the SBM/bursar's skills are more operational and therefore are not core skills for most head teachers. This should make the delegation of school operations to an SBM/bursar a logical move and maybe the first step in a full implementation of distributed leadership.

## **Pillar 2: Clarity of structure and accountability**

Central to distributed leadership is that everyone understands their role and their place in the organisation. This prevents any duplication, conflict or confusion. However, this does not mean that structures are fixed. As new ideas come along people need the flexibility to work in new ways.

Appointing an SBM/bursar enables business management tasks to be centralised enabling duplication, conflict and confusion to be minimised. This then allows the implication of new academic ideas to be tested in terms of operational implications and external restraints. The SBM/bursar can also map out the impact that support staff have on the organisation enabling support staff to take pride in their role and academic staff to appreciate their role. This helps to create an environment whereby everybody counts.

## **Pillar 3: Investment in leadership capability**

This factor is internal to leaders based on:

- Our own role models – what we consider a leader to be against which all other leaders are compared.
- Our self-image – our perception of our own leadership skills, which may or may not be connected to reality.
- Our values – externally evaluating other leaders and internally being proud or ashamed of our own characteristics.

These factors determine how we react to leaders and therefore are crucial aspects in organisational success.

In terms of the SBMs/bursars role there seems to be a perception from many teachers (Source: hot seat NCSL – Where do Bursars fit in 2006) that schools should be driven from the learning and education perspective and thus only by teaching staff. SBMs/bursars need to gather data that proves their impact on schools while also highlighting examples where SBMs/bursars are already accepted e.g. in many state secondary and independent schools.

## **Pillar 4: A culture of trust**

This pillar is about allowing open debate, being seen to evaluate the issues and making fair decisions that are openly implemented within a framework that adds value to the school.

In terms of the SBM/bursar, academic staff needs the time to discuss the pros and cons of a bursars role with school leaders. Some schools have used consultant bursars to facilitate this evaluation. Any new bursar needs to win hearts and souls by getting out and solving issues, freeing time for teachers to teach and above all being seen as a reliable port of call for advice.

## **Pillar 5: A turning point**

Often distributed leadership starts from a major change in the organisation, e.g. a new head teacher, climbing out of a deficit, a new academic strategy etc. This gives the catalyst for change, which then depends on the other four pillars for successful implementation.

For Hockerill Anglo-European College (HAEC) the combination of a new principal, a budget deficit, a change to Grant Maintained status and a new strategy to internationalise the curriculum provided the ground for a more distributed approach to leadership. Extending this the College has always supported professional development with many staff studying Master degrees and professional business qualifications. This culture has extended to the students with surveys consistently showing that students feel part of something special and unique.

The evaluation helps to support the role of SBMs/bursars within a distributed leadership team. However, is this actually happening in schools? To test this there is a need for survey data, limited to English state schools, for the purposes of this paper.

## **Research Methods**

This study aims to describe existing practice in the use of SBMs/bursars and the factors which facilitated or inhibited their use. The key research questions that arose were:

- Are schools appointing SBMs/Bursars?
- Are they part of the SLT?
- What factors are impacting appointments?
- What roles are being undertaken by the SBM/bursar?
- At what level are SBMs/bursars working?
- What qualifications are held?
- How do pay rates compare to those of teachers?

### **Review of research methods**

Due to the constraints of the NCSL Research Associate programme, all data collection needed to be carried out within 6 months. For this project the need for a large sample with a mixture of closed and open questions excluded the possibility of interviews, focus groups and observations and the lack of prior research excluded the option of documentary analysis and experiments (leaving cross-sectional surveys as the only viable option [Bryman 2004]). This survey was developed with the assistance of the Research Group at NCSL, targeting existing SBMs/bursars. Practicing SBMs/bursars and DSBM Cohort 1 graduates were used to test the research questions and to validate the pilot survey. They were asked to assess the survey against Robson's (2002) ideals of good questions, namely:

- clear
- specific
- answerable
- interconnected
- substantively relevant

To ensure a good response rate, the survey was attached to a hot seat on NSCL's 'Talk to Learn – Bursar's count community' (refer to Appendix A for a blank Survey and Appendix B for an extract of comments made on the hot seat).



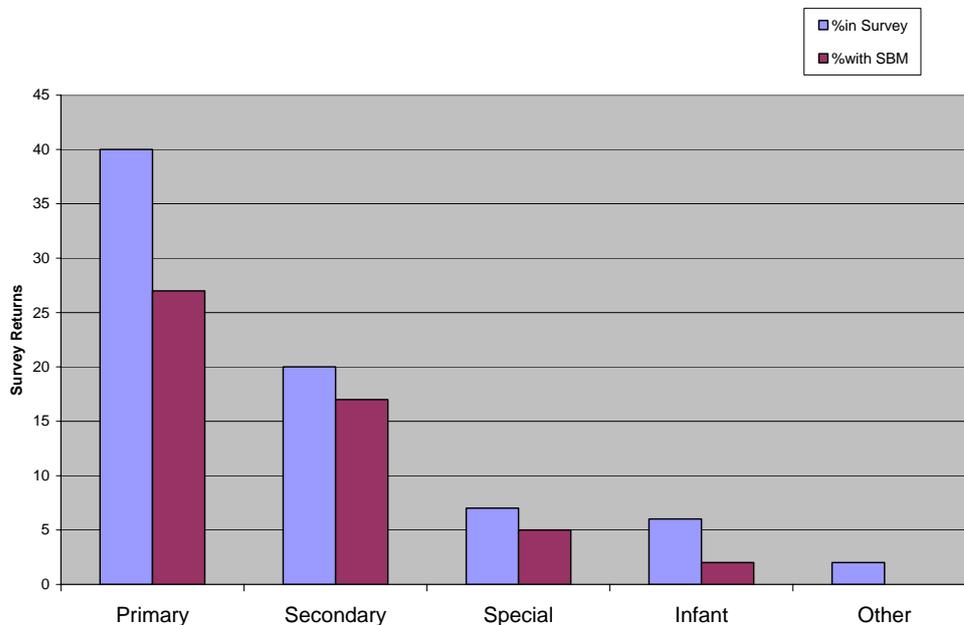
which is growing as new CSBM and DSBM students are added. However, DSBM students will have already completed the CSBM so the number of 7250 is likely to be overstated. This increase for 07/08 is expected to be 1400. However, active use of the bursars count site is about 25 users/day (based on the total hits on the bursars count notice board Oct-Dec 2007) and many of the total population will not be active users. In this context, the total hits of 3279 on the hot seat represent potentially 45% plus of the total population. The hot seat contributions of 353 then represent 5% of the total population and 11% of the hits. Completed surveys of 75 represent 2% of the hits and 21% of the hot seat contributions. At 12 hits per day the hot seat represents 48% of the overall bursars count site usage. Due to the national nature of the NSCL website there is unlikely to be any regional bias in the contributions and surveys. However it is important to note that the cross section of SBMs/bursars having access to the NSCL site is restricted to those that have completed or are completing the CSBM or DSBM programmes. These represent a sample of SBMs/bursars that are already committed to improving their school, are seeking personal development and who generally have a supportive head teacher. In a wider survey the results would likely be different in terms of qualifications, job role and seniority.

### Review of survey and hot seat

Of the survey results, the bulk came from primary schools:

- 54% primary schools – 66% of which were SBMs/Bursars
- 26% secondary schools – 86% of which were SBMs/Bursars
- 9% special schools – 80% of which were SBMs/Bursars
- 7% infant schools – 25% of which were SBMs/Bursars
- 4% other

**Figure 2. Survey numbers by school phase**



This was reflected in the hot seat as well. Particular issues that arose on the hot seat were:

- SLT and teacher resistance to the role of SBMs/bursars in primary schools based around funding and SLTs being the preserve of teachers.

- In cases where the SLT and head teacher were in favour of SBMs/bursars there were cases of Local Authorities (LA's) using collective job descriptions to downgrade the role.

This was reinforced within the survey with a number of respondents claiming to be the only primary SBM/bursar within their authority.

74% of respondents were from community schools and 19% voluntary aided/controlled. The other 7% were from foundation and independent schools.

## **Main findings: by school phase**

### **Prevalence of SBMs/bursars in schools**

- **Seniority of the SBM/bursar as part of the SLT**

69% of the respondents had the title of SBM/bursar, making up 86% of all respondents on their school's SLT. This data is supported by the SBM 2007 baseline study (Wood 2007) that found that 68% of the respondents had the title of SBM/bursar. This suggests that the roll of SBM/bursar is starting to become the accepted job title for this role in schools. However, the nature of the sample (CSBM/DSBM graduates and students) is likely to skew the data so it is difficult to extrapolate for the wider SBM/bursar population. That said, one of the targets of the CSBM/DSBM is for it to become the default qualification for all SBMs/bursars so a 59% membership of the SLT is reassuring.

Looking beyond titles, another key indication of the seniority of a role is the number of staff and the breath of the role. Looking at the number of support staff to those managed by the SBM/bursar there were large differences with many cases of the SBM/bursar only managing the office team. Overall the average number of support staff in place was 30 with 12 being directly managed by the SBM/bursar (40%). Looking solely at primary schools the average number of support staff drops to 23 with 10 being directly managed by the SBM/bursar (43%). This reflects the smaller sizes of primary schools. The average length of time for an SBM/bursar being part of the SLT was 3 years but this is inevitably skewed because secondary schools have had SBMs/bursars for a much longer time period. Removing secondary schools reduces the average to 2 years against the secondary average of 5 years. This indicates that many primary SBMs/bursars have only become members of the SLT within the timeframes of the CSBM and DSBM programmes. Comments received on the Hot seat support this noting a lack of understanding of the SBM/bursar role in primary schools and of the potential for change.

- **Reasons for appointment**

Looking at the reasons for SBMs/bursars becoming part of the SLT the main reasons quoted were:

- Studying the CSBM/DSBM and Degree in SBM and thereby demonstrating additional skills and professionalism.
- Change of head teacher or head teacher wanted to change the structure reflecting the training given under the NPQH to new heads and a general desire for a better work-life balance.
- Deputy leaving offering the opportunity to replace the deputy head teacher with a senior teacher and an SBM/bursar.

- Budget deficits requiring enhanced financial and operational skills as would be provided by an SBM/bursar.
- DCSF Financial Management Standards in Schools, TLRs and workplace reform all moving the headteacher outside his/her comfort zone.

On the negative side, the main reason given for excluding the SBM/bursar from the SLT were that:

- It should be the preserve of teachers only as delivery of education to pupils is the main/sole aim of schools and teachers the main/sole instrument in that delivery
- There were insufficient funds to support increased input from the support team.

### Nature of the SBM/bursar role

- **Tasks undertaken by the SBM/bursar**

Looking at the range of tasks that SBM/bursars undertake, there were wide variations across schools, both in terms of tasks completed and the level of the tasks.

Figure 3. Range and level of tasks undertaken by the SBM/bursar

	Primary	Secondary	Total	% Diff.
Risk Management	2.0	2.1	2.1	5%
Project Management	2.2	2.6	2.4	18%
Finance	2.7	3.3	3.0	22%
Support Teaching	0.8	1.3	0.7	63%
Premises Management	2.3	2.7	2.6	17%
Personnel	2.3	3.0	2.6	30%
ICT delivery-whole school	1.1	1.6	1.3	45%
Clerk to Governors	0.6	0.6	0.7	0%
Health & Safety	1.8	2.0	2.0	11%
Office Management	2.9	2.7	3.0	-7%
Averaged total	1.9	2.2	2.0	16%

Scores represent:

- 0.0 Not part of role
- 1.0 Administration (Doing the task)
- 2.0 Operational Supervision (Overseeing the people doing the task)
- 3.0 Tactical Management (Actively managing that area)
- 4.0 Strategic Management (Concentrating on the strategic aspects only)

Averaged Total The level that SBMs/Bursars are working at across all tasks Within their respective school phase

On average, SBMs/bursars in secondary schools are performing tasks at a more senior level,. The tasks involving the highest levels of management for both secondary and primary schools were; finance, office management, personnel and premises. Of these four key tasks, the biggest difference in the level of management between secondary and primary schools was within personnel. In secondary schools, SBMs/bursars play a more active role in personnel issues, than those in primary

schools. This may be due to the fact that many secondary schools manage staff in-house, rather than using LA personnel services. Conversely, office management was performed at a more senior level in primary schools probably reflecting the direct management of the office team (in secondary schools the bursar/SBM has a much wider remit which tends to downgrade the importance of office management).

Areas such as teaching support were rarely managed by bursars/SBMs in primary schools but are increasingly being undertaken by secondary school bursars/SBMs. Clerking seem to be a area that is not key to either secondary or primary school bursars/SBMs. ICT is another area with significant differences across primary and secondary schools (45% difference). Nearly all secondary schools seem to have ICT roles with many having separate ICT managers. In primary schools, the role seems to be undertaken either by an individual technician or else it is a bought in service from the LA. .

When the scores rating the level of SBM/bursar roles was averaged, none reached the level of tactical management in either primary or secondary schools. This suggests that the SBM/bursar role is still not regarded as a senior position. However, this disguises significant variations within secondary schools (36% of SBM/bursars in secondary schools were performing largely at the strategic management level). There are also cases where SBMs/bursars in primary schools performed at the strategic level, including two cases where the deputy was replaced by an SBM and a senior teacher. This may indicate that the majority of primary SBMs/bursars have to oversee or carry out operational tasks without the scope or resources to manage tactically or strategically. There may also be aspects of headteachers and SLT members retaining control over certain activities. Some of the respondents noted that they had persuaded SLT members to pass over tasks such as premises management and catering. It was also interesting to observe that certain tasks, normally associated with teaching staff, have started to move to the SBM/bursar e.g. student data analysis, exams officer, school council and extended schools.

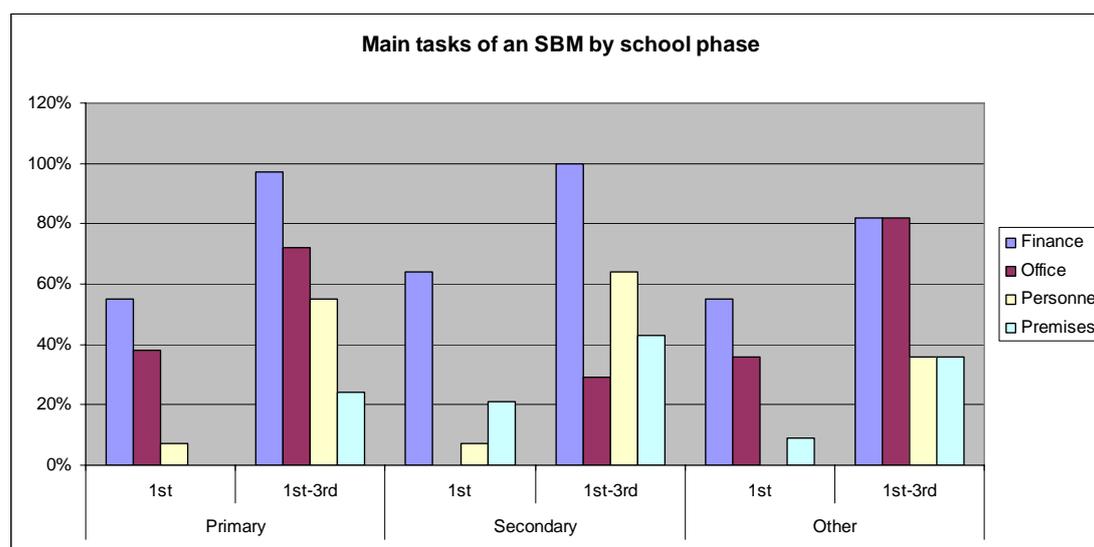
These findings were also borne out during the hot seat, with SBMs/bursars picking up tasks due to the greater depth of knowledge gained from studying the CSBM and DSBM. Roles also evolved with the incumbent as they proved themselves. However, many SBMs/bursars, particularly in the primary sector, found that they were expected to do more tasks with little or no increase in hours or manpower. This supports the mainly administration and supervision findings in the survey for primaries. Many felt the only way to progress was to move into the secondary sector. Looking at the tasks taking the most time for SBMs/bursars, finance was ranked 1-3 for 93% of schools and 1<sup>st</sup> for 56%. This was followed by:

- Office – 1-3 65% and 1<sup>st</sup> 28%
- Personnel – 1-3 52% and 1<sup>st</sup> 6%
- Premises – 1-3 31% and 1<sup>st</sup> 7%

Other factors, such as project management, risk, health & safety and clerk to the governors made up the remaining key tasks.

**Figure 4. Activities taking up the majority of the SBM/bursar's time**

	Primary		Secondary		Other	
	1 <sup>st</sup>	1 <sup>st</sup> -3 <sup>rd</sup>	1 <sup>st</sup>	1 <sup>st</sup> -3 <sup>rd</sup>	1 <sup>st</sup>	1 <sup>st</sup> -3 <sup>rd</sup>
Finance	55%	97%	64%	100%	55%	82%
Office	38%	72%	0%	29%	36%	82%
Personnel	7%	55%	7%	64%	0%	36%
Premises	0%	24%	21%	43%	9%	36%



Whilst finance is seen as the main task for SBMs/bursars in both primary and secondary schools, there are considerable variations in the role they perform with regard to the office management function. With the larger support staff teams in secondary schools (45 average versus 30 average for primaries) it would appear that the SBM/bursar is better able to delegate the office function. Whilst this is not fully borne out in the average secondary school score of 2.7 (for office management), this conceals the large variations across secondary schools. 71% of the SBMs/bursars in secondary schools averaged 3.4 for responsibility with nearly 30% working at the strategic level. However, 29% averaged just 1 in terms of responsibility. This last group seems to be due to the respective structure of those schools with split roles for administration.

The larger concentration on administration within primary schools may also reflect higher levels of support from local authorities leaving the support teams to concentrate mainly on office and finance issues. This aspect was also noticeable in the premises management where the secondary schools ranked premises management as one of the three main tasks in 43% of the cases versus 24% for primary schools. This suggests that primary schools make more use of the local authority retained contractors to manage their premises issues. Interestingly, special and infant schools seem to manage their premises more than primaries, scoring 36%. This may reflect the smaller size of the schools, forcing staff to multi-skill and also the fact that funds are more limited. There are also aspects of the senior leadership team and governors taking up the more strategic tasks, leaving the administrative tasks to the support team. Evidence from the survey and the hot seat indicate that the increased knowledge of the SBM/bursar, derived from the CSBM and DSBM programmes, is starting to take these strategic operational tasks away

from the senior leadership team. These tasks can be defined as core tasks or specialist tasks, such as:

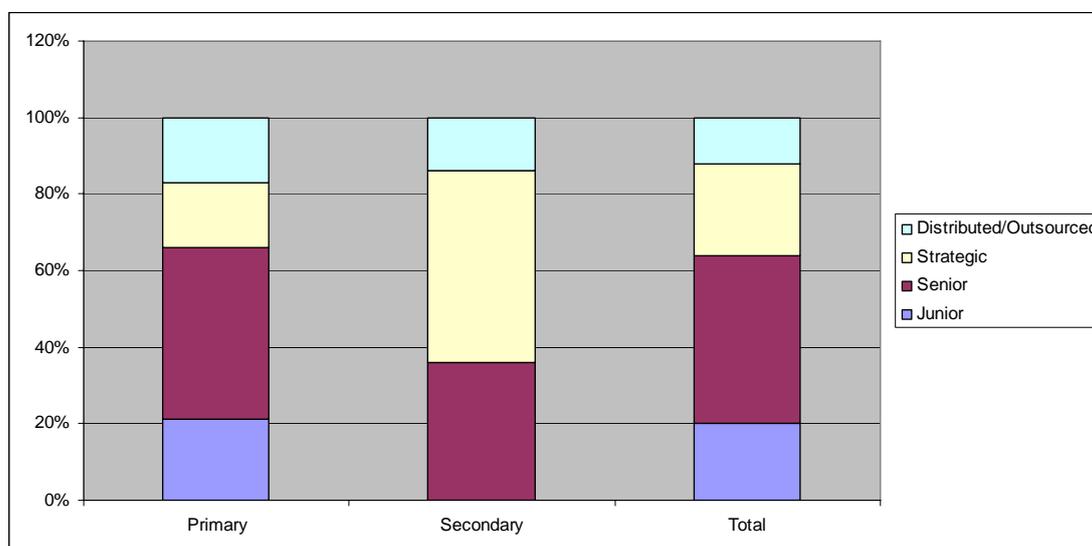
- Core tasks - insurance, catering, health & safety, funding, marketing, information technology, risk management, budgeting, appraisals, premises management, and human resources.
- Specialist tasks - attendance, teaching assistant and PPA time planning, SEF drafting, nutrition, exams officer, school council, extended school, data analysis, and educational visits co-ordinator.

In total, nearly 60% of the survey respondents reported taking tasks from members of the senior leadership team. This supports the comments from the hot seat, that tasks are switched as the headteacher and senior leadership team gain confidence in the SBM/bursar.

**Figure 5. Seniority of SBM by school phase**

Level SBM/bursar operating at	Primary	Secondary	Total
Junior	21%	0%	20%
Senior	45%	36%	44%
Strategic	17%	50%	24%
Distributed/Outsourced	17%	14%	12%

Levels represent: Junior – Operational Supervision  
 Senior – Tactical Management  
 Strategic – Strategic Management



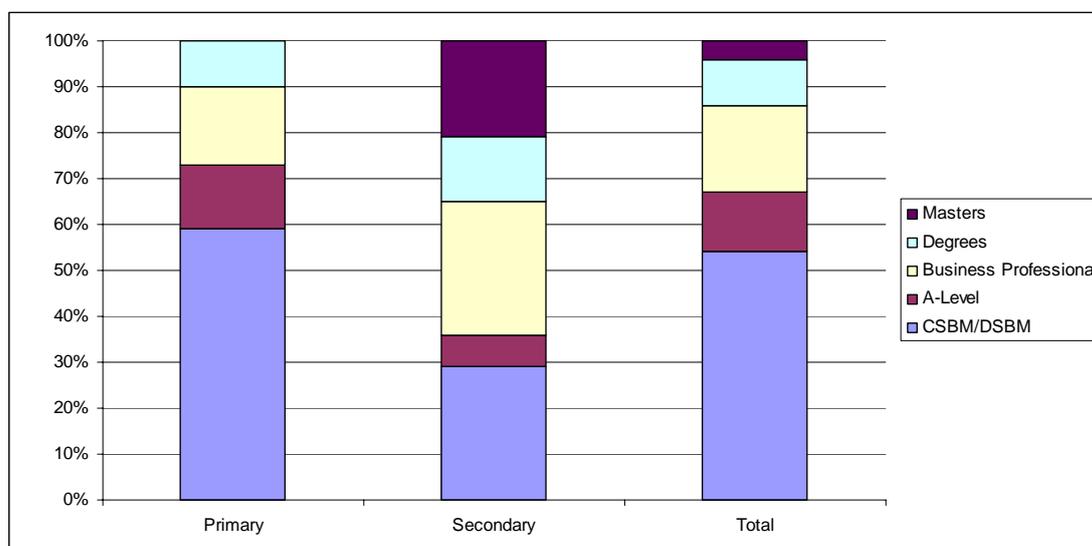
Looking at the SBM/bursar model used in schools, there was a wide variation from junior through senior to strategic but few examples of outsourced and distributed. There were no examples of shared models although examples can be found on [teachernet.gov.uk/management/atoz/b/bursars](http://teachernet.gov.uk/management/atoz/b/bursars). Overall, 44% of schools had an SBM/bursar operating at a senior level, 20% at junior, 24% at strategic, and 12% distributed/outsourced. However it is important to look at the split between secondary and primary schools. At secondary level 0% of SBMs/bursars are operating at the junior level, 36% at senior and 50% at strategic. This again reinforces the evidence that the larger the school, the more senior the role given to SBMs/bursars. The average roll of the secondary schools being 1035, versus 288 average for primary

schools. However, 17% of primary schools did have SBMs/bursars working at a strategic level reflecting the scope to re-organise the senior roles in primary schools. The 20% of junior roles in primary schools suggest that there are still a large number of schools where the SBM/bursar role has not moved beyond the secretarial level. This was also borne out in the hot seat where many primary SBMs/bursars still had to run the office while trying to balance the more strategic tasks. Many felt that this made their position extremely difficult and were considering a move into the secondary sector. However, with 45% of primary SBMs/bursars operating at the senior level, this suggests that the majority of schools are finding some resources to enable the SBM/bursar to manage tasks rather than having to perform them themselves. Key issues on moving to a more strategic role, that were raised in the hot seat, included funding and better understanding of the role of teaching staff.

## Qualifications and professional development

**Figure 6. SBM Qualifications by school phase**

Highest Qualifications	Primary	Secondary	Total
CSBM/DSBM	59%	29%	54%
A-Level	14%	7%	13%
Business Professional	17%	29%	19%
Degrees	10%	14%	10%
Masters	0%	21%	4%

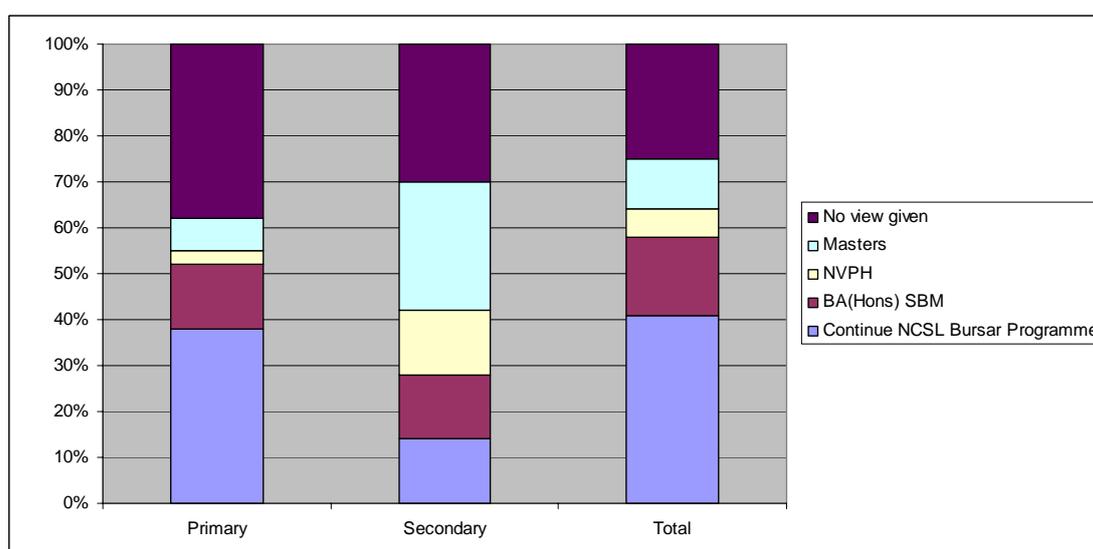


In terms of qualifications, 54% of SBM/bursars had the CSBM or the DSBM as their highest qualification and nearly all of them deemed it important to their role as an SBM/bursar. Only 13% had A-levels as their highest qualification and none had O-levels/GCSE as their highest qualifications. This suggests that SBMs/bursars are increasingly becoming a professional body of employees although still not as well qualified as teachers (who all have degree level qualifications). However it should be noted that the percentage of SBMs/bursars having the A level or O level/GCSE as the highest qualification would be much higher in a sample of the overall SBM/bursar population as this sample is restricted to those undertaking the CSBM and DSBM programme. Of the remaining SBMs/bursars, their highest qualifications were 19% business professional qualifications, 11% degrees and 4% Masters. However, SBMs/bursars within the secondary school sector are more highly qualified, with

nearly two thirds of SBMs/bursars holding a degree level or higher qualification. In addition, 40% held qualifications likely to be higher than those held by teachers (Masters or business professional qualifications). This gives those SBMs increased professional authority and helps to explain the number of secondary schools where the SBM/bursar is operating at the strategic level (50%). The ability to convert the DSBM into a degree with a further year's study is likely to increase the percentage of SBMs/bursars with a degree and hence their professional standing with teachers. In addition, the College's further developments through its recently announced School Business Director programme will create a career pathway for SBMs from Level 3 through to Level 7/8

**Figure 7. Future SBM training plans by school phase**

Future training requirements	Primary	Secondary	Total
Continue NCSL Bursar Programme	38%	14%	41%
BA (Hons) SBM	14%	14%	17%
NVPH	3%	14%	6%
Masters	7%	28%	11%
No view given	38%	30%	25%

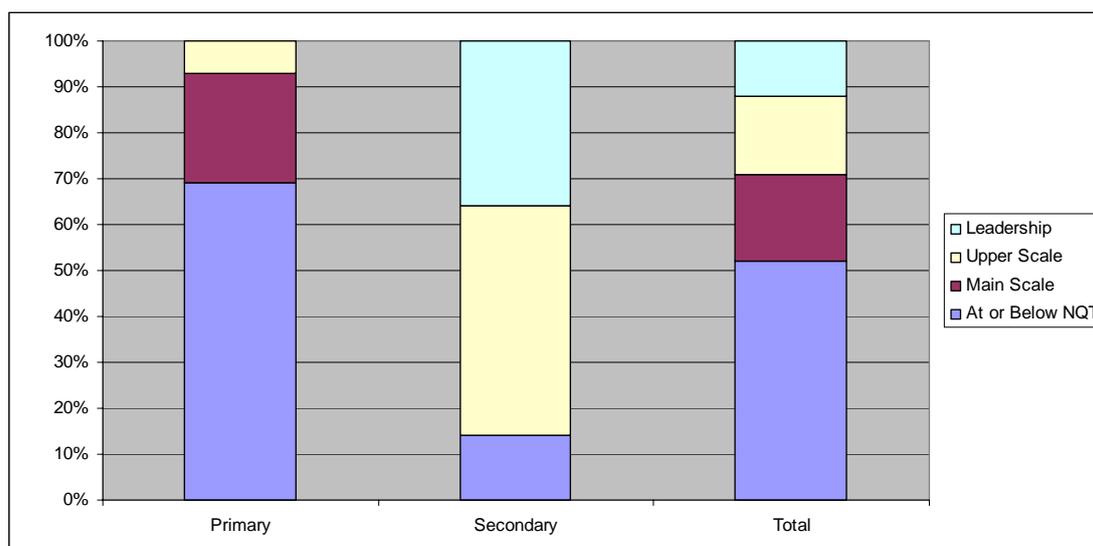


Looking at future training requirements, 41% of SBMs/bursars want to continue with the NCSL SBM/bursar training programme, with the bulk being made up of primary school SBMs/bursars who wish to progress to the DSBM. The 25% of respondents not giving a view (38% for primary schools) may reflect the perceived lack of opportunities to study beyond the DSBM. While the degree in SBM, offered by the Manchester Metropolitan University, allows the DSBM to be converted into a degree with one years study it is unlikely to be as accessible as the CSBM and DSBM programmes. There is also the issue of payment for training that primary schools, in particular, may have funding issues with. In addition, 17% of respondents wanted to study for the BA (Hons) in SBM, 11% wanted to do a Masters degree and interestingly 6% wanted to do the NPQH. This indicates a desire to push the barriers and professionalise the role. Looking at the split across secondary and primary schools 42% of secondary SBMs/bursars are seeking to study for a masters or NPQH as opposed to 10% for primary schools. However this is likely to be as a result of the higher qualifications already held by secondary school SBMs/bursars. Many of the secondary school bursars have studied the DSBM already, hence the lower

percentages for continuing in the bursar development scheme offered by the NCSL (14% versus 38% for primary schools).

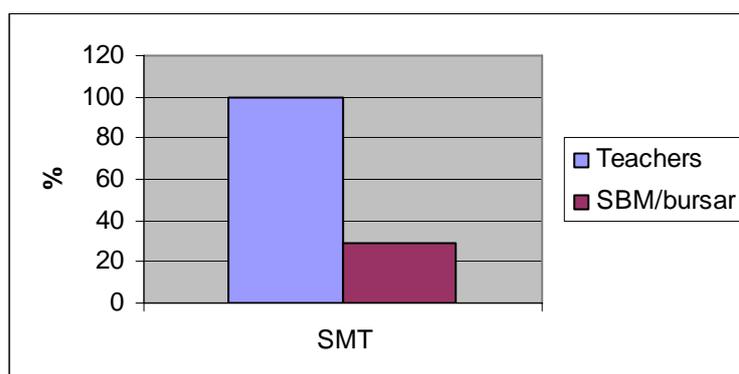
**Figure 8. SBM pay rates v teachers by school phase**

Pay rates versus Teacher scales At or Below NQT	Primary	Secondary	Total
Main Scale	69%	14%	52%
Upper Scale	24%	0%	19%
Leadership	7%	50%	17%
At or Below NQT	0%	36%	12%



Looking at pay rates, 52% of SBMs/bursars were paid at or below NQT rates for teachers. The vast majority of these worked in primary or infant schools. Given that all of these would have completed or be completing the CSBM and the NQT rates are the minimum pay levels for teachers, the two do not compare well. In terms of other pay rates 19% are paid at main scale, 17% at upper scale, and 12% at leadership scale. As the leadership/upper scale is the norm for teachers on the SLT, less than 30% of SBMs/bursars are paid on the same scales as their SLT counterparts. This situation is even higher in primary schools, where only 7% of SBMs/bursars are paid on a similar scale to the other members of the senior leadership team. Within secondary schools, 86% of SBMs/bursars are paid on the upper scale or above suggesting some level of equality. However, based on the discussions on the hot seat, even these SBMs/bursars are paid less than their counterparts on the SLT. A particular issue on the hot seat was the role of the LAs in preventing SBM/bursar roles in primaries developing and in holding down pay rates. The survey found that in 31% of cases, the LA had a role in setting the pay rates.

**Figure 9. Percentage paid at upper scale or above in SMT**



**Key issues that came out of the survey were:**

- Secondary and special schools have generally adopted the concept of SBMs/bursars while primary and infant schools are generally still at the justification stage.
- A large number of schools now have SBMs/bursars but not all are on the SLT.
- For primary schools, on average, SBMs/bursars had only become members of the SLT within the last two years.
- Funding and perceptions of support staff are still serving to prevent SBMs/bursars doing a senior role, particularly in primaries
- In many cases, the SBM/bursar role had developed following a major change to the school, external pressures or because of the SBM/bursar improving their skills.
- Whilst finance, office and personnel remain the main remits of the SBM/bursar they are increasingly pushing into premises, project management, and health & safety.
- Schools are also starting to look at traditional teacher activities such as exams officer, student data and extended schools
- 88% of schools follow a traditional SBM/bursar role but at a variety of levels. However options such as distributed, shared and outsourced could be viable options for infant and primary schools that cannot afford the services of a full time SBM/bursar.
- The CSBM and DSBM have increased the skill levels of SBMs/bursars and encourage further study with 75% wanting to study further and 34% wanting to do degrees, masters and the NVQH.
- Pay rates remain below those of other SLT members with 52% paid at or below NQT rates.
- The LA's have a role in setting SBM/bursar salaries in 31% of cases and the respondents felt that they used their influence to hold back SBM/bursar salaries.
- SBM/bursar roles are more developed in the north (71% on the SLT), particularly in the region's secondary schools.
- The role of SBM/bursar is patchy with examples of strategic roles in primary schools offset by many junior roles.
- The senior SBM/bursar role in infant and special schools is much more developed in the south.

- More SBMs/bursars held business professional qualifications in the north than any other region (52% more than the midlands and 123% more than the south).
- Aspirations for further study are strongest in the north and south with 50% and 38% desiring to start a degree level or higher qualification.
- Pay rates are fairly consistent across regions.

### Summary by school phase

Task	Primary	Secondary	All Schools Inc. Special
% SBM/Bursars	72%	86%	69%
% On SLT	52%	79%	59%
% of Support team managed by the SBM/burs	43%	31%	40%
Average time on SLT	2 years	5 Years	3 Years
Main three tasks done			
Finance	97%	100%	93%
Office	72%	29%	65%
Personnel	55%	64%	53%
Premises	24%	43%	31%
Main task done			
Finance	55%	64%	56%
Office	38%	0%	28%
Personnel	7%	7%	6%
Premises	0%	21%	7%
Other	0%	8%	3%
Level SBM/bursar operating at			
Junior	21%	0%	20%
Senior	45%	36%	44%
Strategic	17%	50%	24%
Distributed/Outsourced	17%	14%	12%
Highest Qualifications			
CSBM/DSBM	59%	29%	54%
A-Level	14%	7%	13%
Business Professional	17%	29%	19%
Degrees	10%	14%	10%
Masters	0%	21%	4%
Future training requirements			
Continue NCSL Bursar Programme	38%	14%	41%
BA (Hons) SBM	14%	14%	17%
NVPH	3%	14%	6%
Masters	7%	28%	11%
No view given	38%	30%	25%
Pay rates versus Teacher scales			
At or Below NQT	69%	14%	52%
Main Scale	24%	0%	19%
Upper Scale	7%	50%	17%
Leadership	0%	36%	12%

## Potential implications and way forward

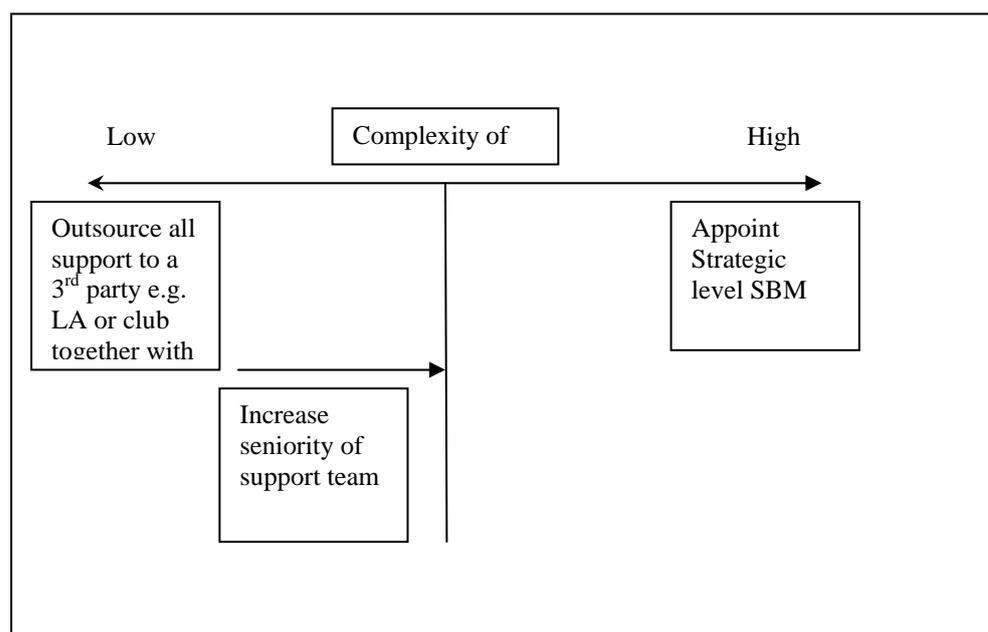
Recent years have seen a number of developments which have increased the scope of leadership skills required for the effective leadership of our schools. At the heart of these is increased pressure on schools to continue to improve standards whilst at the same time, more effectively managing their resources. Changes in levels of support offered to schools in this area have also increased pressures on them to develop their own in-house expertise on business management issues. With most headteachers coming solely from an educational background many find it difficult to take on board the additional tasks of managing resources effectively. This in turn is discouraging many deputies and middle leaders from applying for headships. At the same time, many head teachers are due to retire over the next five years. One option, to address these issues, is to broaden distributed leadership to incorporate SBMs/bursars.

The SBM role has worked effectively in the independent school sector and in business for many years. Furthermore, there is increased evidence to demonstrate the ways in which state schools have benefited from restructuring their leadership teams to include SBMs as demonstrated by the case studies on Teachernet ([www.teachernet.gov.uk/management/atoz/b/bursars](http://www.teachernet.gov.uk/management/atoz/b/bursars)). Examples of these include increased efficiency in areas such as financial management, health & safety, project management and personnel. Meanwhile, the Certificate and Diploma for School Business Managers have made a significant contribution in training a cadre of professional school managers to fulfil these roles.

A lack of understanding as to the nature of a SBM/bursar's role and the ways in which schools can benefit from the role, appears to be the main inhibitor to a wider take up of SBMs/bursars. This exists at several levels. Firstly, school staff in general may be confused or uneasy over the nature of this role and its implications for their own work. Governors and other school leaders may also be unaware of the diversity of SBM/bursar roles and the potential contribution they may make to the effective running of their school.

Awareness raising sessions and sharing case studies of other schools' experiences of SBMs/bursars could help to address these concerns. Schools may also benefit from greater understanding about the ways in which they could use the introduction or expansion of new initiatives to review their leadership structure and their use of SBMs/bursars (looking at adding value). Adopting a remodelling approach, such as Aldridge (2005) as detailed in appendix C, which considers the strengths and weaknesses, school culture, opportunities and threats and the school environment, can help to identify the need for an SBM/bursar. This enables schools to tailor the appointment of an SBM/bursar to fit their own particular circumstances. It is likely that the eventual SBM/bursar role will be shaped by the complexity of the school (as detailed in figure 17 overleaf). The survey and hot seat results demonstrate that many primary schools have not proceeded fully down the SBM/bursar route and where they have progressed, it has been on an iterative basis as the SBM/bursar has gained experience and further training. In particular, many primary SBMs/bursars that contributed to the hot seat felt that the only way to progress was to move to a secondary school.

**Figure 10. Options model for support team structure**



Key issues to be addressed arising from the survey seem to be:

- There is still an ongoing need to publicise how bursars/SBMs add value so that the frequently quoted 'lack of resources' argument can be addressed. Good bursars/SBMs save money and can significantly reduce their costs. They also free up senior management time to enable schools to improve. This message particularly needs to be reinforced in primary schools where resources are tight. The latest budget allocations for schools have an element of funding withheld which is dependent on making savings from improved purchasing.
- Separate pay scales for school staff with corresponding reductions in LA control over grading.
- Additional training beyond the DSBM to cover leadership. Primary schools in particular find it difficult to commit to funding degree and Master level training programmes.
- A closer matching of teacher and SBM/bursar pay levels to underline the seniority of the SBM/bursar position. This already happens within the independent sector and in some state secondary schools.

Development of SBM/bursar positions seems to vary significantly across regions typified by:

- A cluster of secondary schools in the north with SBMs/bursars operating at the strategic level.
- Examples of primary schools in the midlands where the SBMs/bursars are operating at a strategic level. The midlands, however, on the basis of this survey, also has the most examples of primary school SBMs/bursars at the junior level.
- Many special and infant schools in the south have SBMs/bursars operating at the senior level in spite of the relative small size of the schools.
- SBMs/bursars in the north are more highly qualified than those in other regions (50% having degree or higher qualifications versus 37% in the midlands and 25% in the south).

These regional differences have implications for the delivery of the national CSBM/DSBM programmes, which could be addressed by piloted local delivery programmes and an additional tier to the NCSL's bursar qualifications. In addition, there may be scope to further strengthen the links with the SBM degree and master programmes providers as well as the NBA's (National Bursars Association) Licensee programme provider (to enable bursars/SBMS to have a more seamless choice of qualifications).

Overall the key issue that has come out of this research is that the SBM/bursar role in primary and infant schools is still at an early age in its development. With the demographic factors affecting head teacher retirement and prospective head teacher applications an opportunity exists to change the breath of the head teacher role.

However this change will require:

- A re-look at the funding of support staff roles in primary schools.
- Greater flexibility in the rates of pay for SBMs/bursars.
- A better understanding of the role that SBMs/bursars can deliver.

These issues are starting to be addressed with:

- A national pay bargaining body for school support staff.
- The PricewaterhouseCoopers Report (2006) on leadership.
- The TDA (Training Development Agency) publications 'Looking for a bursar' (2007).
- Continuing development of the CSBM and DSBM programmes including the encouragement of staff outside the school sector to take up the CSBM and DSBM programmes.
- Financial Management Standard in Schools requiring the SBM/bursar to be in a senior leadership role.
- OFSTED reviewing the Financial Management Standard in Schools.
- NCSL plans for advanced school business managers (ASBM) and school business directors (SBD) in primary schools will introduce a career pathway for school business managers both for CSBM & DSBM graduates and those wishing to come into the profession.

## **Concluding comments**

Overall, we still seem to be at a transitional stage in the adoption of bursars/SBMs in English state schools. The increasingly distributed nature of school leadership is creating opportunities but there is still a need for the 'Why recruit a bursar/SBM' question to be addressed to a wider audience. Particularly in primary schools, the ability of CSBM/DSBM graduates is outstripping the knowledge of what they can do and the willingness to use their skills fully. The range of measures that are being adopted by the TDA, DCSF and the NCSL are helping to address these issues. In addition, the CSBM/DSBM graduates are changing perceptions of bursars/SBMs within schools.

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## **Appendix A. Questionnaire for bursars/SBMs**

The role of bursars/school business managers (SBMs) in the development of distributed leaderships within schools

Dear Bursar/School Business Manager,

The attached questionnaire forms part of the research I am conducting as part of my National College for School Leadership research associateship.

It centres on the ever-expanding role of headship and the need for distributed approaches to leadership to aid both organisational efficiency and leadership sustainability. Bursars/SBMs offer a very different skill set to all other leadership roles in schools and thus allow re-distribution of commercially related responsibilities.

The research also centres on the premise that the development of the bursar/SBM role is a journey for schools. While context impacts upon the practicalities of implementing the bursar/SBM role, there are a range of options available to schools and awareness of these may be limited. This research is designed to develop a spectrum of models that schools can refer to, enabling them consider their own context in light of its findings, envisaging potential change.

With all the Certificate & Diploma in School Business Management (CSBM & DSBM) graduates and graduates there is a massive opportunity for schools to learn from each other and develop what might presently be seen as an under used resource.

The enclosed questionnaire, aimed at bursars/SBMs, is seeking to

- Identify how schools currently use bursars/SBMs, looking at responsibility, roles and their contribution to distributed approaches to leadership;
- Understand the factors within schools that currently facilitate or hinder the development of bursar/SBM roles; and,
- Ascertain the background and qualifications currently needed to be a bursar/SBM and whether these change with context.

The questionnaire can be completed in around 20 minutes, although there is scope for respondees to expand on their responses if they so wish. All responses will be treated as confidential and no respondent will be mentioned by name in the reporting of the research without prior agreement.

If you have any queries relating to the study please do not hesitate to contact me (see details below). I do hope that you will be able to take part in this important research. Many thanks in anticipation.

Mark Aldridge  
Research Associate, NCSL  
Financial Controller  
Hockerill Anglo-European College  
Bishops Stortford, Herts.

## The role of bursars/school business managers (SBMs) in the development of distributed leaderships within schools

### 1. School Information

1.1 Local Authority	
1.2 School Phase (Please tick all that apply)	
Infant only <input type="checkbox"/> Primary <input type="checkbox"/> Secondary <input type="checkbox"/> Special <input type="checkbox"/> Other <input type="checkbox"/>	
Please specify other	
_____	
1.3 Status	
Community <input type="checkbox"/> Voluntary Aided <input type="checkbox"/> Foundation <input type="checkbox"/> Academy <input type="checkbox"/> City Technology <input type="checkbox"/> Other <input type="checkbox"/>	
Please specify other	
_____	
1.4 Number on Roll	

### 2. Staff Structure

2.1 What is your job title?	
2.2a) How many support staff does your school have?	
2.2b) How many support staff are you ultimately responsible for?	
2.3a) Are you on the Senior Leadership Team (SLT)?	Yes <input type="checkbox"/> or No <input type="checkbox"/>
2.3b) If <b>yes</b> , for how long have you been a member?	
2.3c) What factors, if any, led to you being included? <b>(please list your top 3 as short bullet points)</b>	
2.3d) If <b>no</b> , what factors have deterred the school to date? <b>(please list your top 3)</b>	

2.4a) Using the responsibilities below please assess whether you are working at -  
**Level 0** – Not part of your role  
**Level 1** – Administration (doing the task)  
**Level 2** – Operational Supervision (overseeing the people doing the task)  
**Level 3** – Tactical Management (actively managing that area)  
**Level 4** – Strategic Management (Concentrating on the strategic aspect only)

Area of Responsibility	Current Level (1-4)	Please Rank top 3 responsibilities in terms of use of your time
Risk Management		
Project Management		
Finance		
Support Teaching		
Premises Management		
Personnel		
ICT delivery-whole school		
Clerk to Governors		
Health & Safety		
Office Management		
Other		

Please specify other:

2.4b) Please detail any responsibilities that have been transferred from other members of the SLT and what caused them to be transferred

Responsibility:	Why it was transferred:
	Strategic <input type="checkbox"/> Workload <input type="checkbox"/> Expertise <input type="checkbox"/> Other <input type="checkbox"/>
	Strategic <input type="checkbox"/> Workload <input type="checkbox"/> Expertise <input type="checkbox"/> Other <input type="checkbox"/>
	Strategic <input type="checkbox"/> Workload <input type="checkbox"/> Expertise <input type="checkbox"/> Other <input type="checkbox"/>

### 3. Staff Competencies and Experience

3.1a) Which of these bursar models best describes your school -

- Shared** – You and other schools have clubbed together to share a bursar/SBM
- Outsourced** – You buy in bursar/SBM services from your LA or externally
- Junior** – Working at level 2 (supervision), not part of the SLT
- Senior** – Working at level 3 (Tactical) and a part of the SLT
- Distributed** – Work at level 2/3 but bursar/SBM role is distributed across 2 or more support manager roles (please also tick senior/junior to indicate your level)
- Strategic** – Work at level 4 (strategic), on SLT and at same level as deputy.
- Other**

Please specify other  
 \_\_\_\_\_

3.2a) Please detail any factors that led to the development of your bursar model?  
**(please list your top of 3)**

3.2b) Please tick the level of your highest qualifications

<p>GCSE/O Level <input type="checkbox"/> A Level <input type="checkbox"/> CSBM/DSBM <input type="checkbox"/> 1<sup>st</sup> Degree <input type="checkbox"/>  Professional <input type="checkbox"/> MBA/Masters <input type="checkbox"/> Other <input type="checkbox"/> (please specify _____)</p>
<p>3.2c) What professional development in the past has been helpful to you in your role as bursar/SBM?</p>
<p>3.2d) What professional development would support your current work as bursar/SBM?</p>
<p>3.3 Please indicate where your salary fits with reference to the teachers pay scale</p> <p>Below NQT <input type="checkbox"/> NQT <input type="checkbox"/> Teacher (main Scale) <input type="checkbox"/> Teacher (Upper Scale)/ Main scale with TLR's <input type="checkbox"/> Teacher (Upper Scale with TLR's) <input type="checkbox"/> Leadership Scale <input type="checkbox"/> Other <input type="checkbox"/></p> <p>Please specify other _____</p>
<p>3.4 Who decides the salary bandings for the bursar/SBM at your school?</p> <p>LA <input type="checkbox"/> Governors <input type="checkbox"/> Head teacher <input type="checkbox"/> Other <input type="checkbox"/> Please list who _____</p>
<p>3.5 Are there any aspects of your school that make your bursar/SBM role unique?</p>
<p>3.7 Are there any areas relating to Bursar/SBM roles in schools that have not been raised by this questionnaire?</p>

I hope to carry out a small number of follow up interviews with head teachers and bursars/SBMs. If you and/or your head are happy to be interviewed or would like a copy of the research finding please list your details below. I will initially contact you by e-mail to arrange follow up interviews.

I am happy to be interviewed.  I would like a copy of the research.

Name \_\_\_\_\_  
E-mail address \_\_\_\_\_  
Phone \_\_\_\_\_

## Appendix B: Potential toolkit for schools

The survey revealed large variations in the use of SBMs/bursars across schools where CSBM/DSBM graduates and students are working. This is likely to be more widespread taking into the account the full SBM/bursar community. There is, therefore, unlikely to be a unique model that can be applied for all schools. But a toolkit can be useful for head teachers, governors and other staff in understanding the situation faced by the school, the skills available and the benefits of moving down a distributed leadership path. The toolkit below (Aldridge 2005) is meant to act as a facilitator for schools in their evaluation of options.

### Modelling approach

Approach	Model	Expect benefit
<b>Identify</b>		
Cultural make-up	Bush (1995)	To understand the school's Culture
<b>Review</b>		
Model environment faced by	PESTLE Analysis	Identify key factors external to the school
Model environment within	SWOT Analysis	Identify key factors within the school.
<b>Redesign</b>		
Identify development needs		Development Plan
<b>Implementation</b>		
Framework for project management	'Seven S' Framework Handy & Aitken (1988)	Successful project management
Closing Gap: current to project objectives	Force Field Analysis Taylor (1993)	Project objectives met
<b>Evaluation</b>		
Business Review Process	Review meetings termly	Review and revise distributions.

### Identify the organisational culture of your school

Applying Bush's Analysis of School Organisation Culture (1995) to schools the following insights need to be ascertained:

- The characteristic of the overall school network be it Formal, Collegial, Political, Subjective or Ambiguity.
  - **Formal school network** - a hierarchical structure, a boss to worker culture, authoritarian decision-making, imposed goal seeking, and external factors managed by senior staff
  - **Collegial school network** – Round table structure, team culture, consensual decision-making, goal setting from within, and external factors managed by the group
  - **Political school network** – Interest group structure, Conflicting group culture, decision-making by the strongest influence, a power complex goal setting with the most powerful managing external factors.

- **Subjective school network** – Individualistic structure, law to themselves culture, personal decision-making and goal setting and a random relationship to external factors.
- **Ambiguity school network** – variable and randomised structure, incoherent culture, decision-making based on a loose coupling of events, goal setting by a complex mix of influences and a random relationship to external factors.

Individual schools are likely to have facets of differing networks with some stronger than others. To implement a distributed leadership model it may be necessary to address some aspects - be that to reduce influence, strengthen or eliminate.

However, it is important to understand the culture and how it arose before implementing any change. Factors to consider are:

- Who drives change?
- Does the SLT debate real issues and follow them up with agreed strategies implemented by all members of the group?
- Are any groups isolated from decision-making? Do they have responsibility for implementation or strategic direction?
- Are all areas clear on the schools direction? Do some areas react to change rather than form it due to a lack of opportunity to contribute?
- Are some areas of the school operating in an ivory tower, however efficient that may be?

## **Review**

Having identified the school's culture, the next step is to identify key factors in the environment (internally and externally) that will impact the drive for a distributed leadership model using PESTLE (Political, Economical, Socio-Cultural, Technological, Legal and Educational) and SWOT (Strengths, Weaknesses, Opportunities and Threats) analyses. A development plan for successful implementation can then be identified.

**Figure 11: PESTLE analysis – Bursar distributed leadership model**

<b>Key Players</b>	<b>Perception of support services</b>	<b>Likely impact</b>
<b>Political</b>		
DCSF	Actively supporting change with CSBM, DSBM and NVQ for heads plus workplace reform.	Bursar qualifications bring support services in line with teaching.
Local LEA	Starting to digest CSBM/DSBM. Scope to change employment scales	Scale changes will re-enforce message to schools
<b>Economical</b>		
DCSF	Need funding for a 2 <sup>nd</sup> stage of workplace reform	Enable schools to fund revised structure
Headteacher	Identifying workloads to shift from teaching to support services enables TLA's to be re-allocated to support staff	Zero cost to college and better distribution of workloads
<b>Socio-Cultural</b>		
Professionals	Few business professionals make the transition to schools due to roles and pay. Upgrading these would enrich the pool of SBMs/bursars	Improved commercial skills would boost school performance.
<b>Technology</b>		
<b>Legal</b>		
<b>Education</b>		
Academic vs. College Operation	Historically the head has performed the role of Chair and Managing Director with academic departments driving change	As in business these roles need dividing and the support areas given roles for driving change

**Figure 12: SWOT analysis – Bursar distributed leadership model**

<p><b>Strengths</b></p> <p>Do support staff have the skills to step up? Are they willing to? Carry out an audit of skills and aspirations</p>	<p><b>Weaknesses</b></p> <p>Existing structure works why change it? School not seen as a business</p>
<p><b>Opportunities</b></p> <p>CSBM/DSBM Graduates Workplace reform DSFC Financial Standards in Schools</p>	<p><b>Threats</b></p> <p>Are support areas seen as being equal to academic staff? Funding for further workplace reform</p>

### Redesign

Having identified key factors internally and externally the next step is to build a development plan for implementation. Key issues that can arise from the Organisational, PESTLE and SWOT analyses are:

- Support services being fragmented with ambiguity over objectives and a limited role in decision-making - but conversely having a very experienced and qualified team.
- Decision-making being mainly academic in focus with limited emphasis on college operation.
- Workload issues for academic staff.
- DCSM pushing the role of SBMs/bursars to manage school operations
- Opportunities to fund SBMs/bursars via use of TLRs (Teaching and learning responsibility ).

However, a number of school specific issues are also likely to arise. Converting these issues into a development plan for support services key developments are:

- The review of tasks both for support staff and academic staff at all levels of the organisation.
- Carry out a skills audit of support and academic staff and match against tasks identifying any potential transfers or gaps.
- Re-structure support services to cover activities related to school operations. To facilitate this process look at the required seniority for the SBM/bursar (junior, senior, strategic) who may become the 1<sup>st</sup> point of contact for school operation. Also consider options to outsource, share with other schools or distribute across a number of senior support roles.
- Agree a development programme with the SBM/bursar to cover the future movement of work and training programmes, such as the CSBM/DSBM, BA SBM and master degrees

## Implementation

To facilitate the implementation process it is helpful to apply the 'Seven S' framework (Hardy and Aitkin 1988).

**Figure 13 'Seven S' Framework - Bursar distributed leadership model**

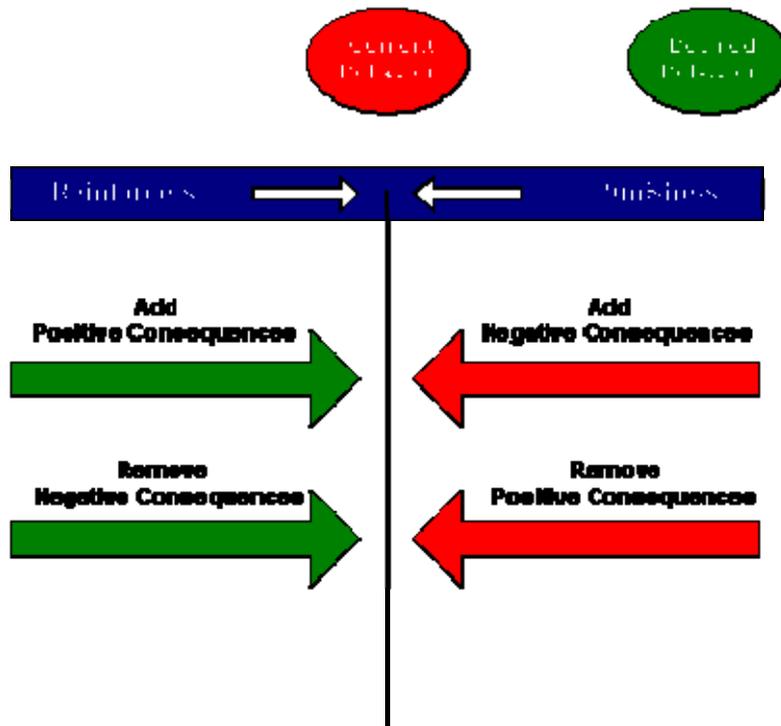
Stand:
<b>Shared Values</b> Ensure no areas of the school are feeling disenfranchised from decision-making. Also that all areas have a common understanding of the change and its implications for the school and their role.
<b>Strategy</b> Workplace reform, DCFS financial standards in schools, TLR's and continuous efforts to raise standards create the opportunity to transfer non-teaching tasks to support services. This fosters shared values, develops support staff and provides the framework to grow the SBM/bursar role.
<b>Skills</b> Carry out a skills audit of all staff matching to existing roles and identifying potential gaps or areas for transfer.
<b>Staff</b> Link skill sets required to personal development plans or use as a basis for external recruitment.
<b>Structure</b> As the support team strengthens the need to grow the SBM/bursar role accelerates to ensure academic and school operation roles remain in-line.
<b>Style</b> The SBM/bursar role requires a strong commercial emphasis (in the US 71% of SBM/bursars come from business or government backgrounds, Miller 2004) coupled with a strategic overview to link academic and commercial goals. For schools this means managing both academic and support staff expectations for change as they progress through the various stages of concern outlined by Hall and Rutherford (1979).
<b>System</b> Measurement of success can be in terms of goals achieved, i.e. the growth of the SBM/bursar role, or in feedback from all parties via staff, parent and student surveys. Short-term successes need to be measured as goal-stones, e.g. did the transfer of purchasing to support services act as a catalyst for change.

The 'Seven S' framework identifies the key issues for implementation, but to develop strategies for handling these issues, force field analysis is useful.

## Force field analysis

Lewin's theory of Force Fields (as described by Lippett (1973)) postulates reactions to change via the use of driver and restrainer forces. This has been enhanced by Taylor (1993) to encompass the issues of commission and omission and positive and negative feedback.

**Figure 14: Force field of reinforcing and punishing forces**



In terms of the bursar distributed leadership model the implications for the implementation process are:

Reinforcers	Punishers
SBM/bursar development offers skills to improve the professionalism of support staff.	Support services lack input into the decision making process.
Recognition by school leadership that support services contribute to successful schools.	Perception is that support services are secondary to academic departments.
Workload of academic staff requires a strengthen support service.	Academic staff expect to drive changes.
TLR's offer the chance to re-distribute pay between academic and support staff as tasks are transferred.	School has worked effectively without developing the SBM/bursar position.

## Appendix C: Blank toolkit schedules

### Bush analysis (1995) – Bursar distributed leadership model

Type of school network	Structure	Cultural Format	Decision-making	Goal-setting	Relationship to environment	Overall rating: High Moderate Low
Formal	Hierarchical	Boss to Worker	Authoritarian	Imposed	From Senior members	
Example in my school						
Collegial	Round Table	Team	Consensual	From Within	From the Group	
Example in my school						
Political	Interest Groups	Conflicting Teams	Strongest Influence	Power Complex	From the most Powerful	
Example in my school						
Subjective	Individualistic	Law to themselves	Personal	Personal	Random	
Example in my school						
Ambiguity	Variable & Randomised	Incoherent	Loose coupling of events	Interaction of complex influences	Random	
Example in my school						

**PESTLE analysis – Bursar distributed leadership model**

<b>Key Players</b>	<b>Perception of support services</b>	<b>Likely impact</b>
<b>Political</b>		
DCSF		
Local LEA		
<b>Economical</b>		
DCSF		
Head teacher		
<b>Socio-Cultural</b>		
Professionals		
<b>Technology</b>		
<b>Legal</b>		
<b>Education</b>		
Academic vs. College Operation		

**SWOT analysis – bursar distributed leadership model**

<b>Strengths</b>	<b>Weaknesses</b>
<b>Opportunities</b>	<b>Threats</b>

**'Seven S' Framework - Bursar distributed leadership model**

<b>Shared Values</b>
<b>Strategy</b>
<b>Skills</b>
<b>Staff</b>
<b>Structure</b>
<b>Style</b>
<b>System</b>

**Force field of reinforcing and punishing forces**

<b>Reinforcers</b>	<b>Punishers</b>

## Appendix D: Bibliography

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