



Estyn

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a Hyfforddiant yng Nghymru

Her Majesty's Inspectorate
for Education and Training in Wales

School business managers; a best practice guide



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APRIL 2010

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- ▲ secondary schools;
- ▲ special schools;
- ▲ pupil referral units;
- ▲ independent schools;
- ▲ further education;
- ▲ adult community-based learning;
- ▲ youth support services;
- ▲ youth and community work training;
- ▲ Local authority education services for children and young people;
- ▲ teacher education and training;
- ▲ work-based learning;
- ▲ careers companies;
- ▲ offender learning; and
- ▲ Department for Work and Pensions (DWP) contracted employment provision in Wales.

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Introduction

- 1 This report has been produced in response to a request from the Welsh Assembly Government in the Minister's annual remit to Estyn for 2009-2010. Estyn has worked with the Wales Audit Office to undertake this survey.
- 2 The report reviews the role and effectiveness of school business managers in Wales and describes best practice through case studies. The term 'school business manager' is used throughout this document, although schools also commonly refer to their school business manager as the principal officer, finance manager, senior administrative officer or resources manager. The title of 'bursar' is less commonly used by schools now as it suggests that the role involves only the school finances, while the role has widened to encompass strategic financial planning, line management responsibilities and a number of specific administrative roles.
- 3 In the 2006-2007 Annual Report, Her Majesty's Chief Inspector of Education and Training in Wales stated that 'most secondary schools use available funds and resources well. Many of these schools benefit greatly from having a bursar or effective finance officer who can provide specialist advice, support and guidance on financial matters'. As a result of the report, the National Assembly for Wales' Enterprise and Learning Committee, in its 2008 report 'Arrangements for School Funding in Wales', recommended that the Welsh Assembly Government review the role of business managers and finance officers and consider producing best practice guidance to be shared among stakeholders. The Minister for Children, Education, Lifelong Learning and Skills accepted this recommendation and included this review in the 2009-2010 remit letter to Estyn.
- 4 In February 2009, the Enterprise and Learning Committee, in its report on progress towards 'Raising Standards and Tackling Workload: A National Agreement', recommended that the Welsh Assembly Government explore the advantage of employing school business managers in larger secondary schools, to support the headteacher and the leadership team.
- 5 This report is based on scrutiny of relevant policies and documents, and on discussions with headteachers and business managers in a sample of schools across Wales. Twenty-three schools contributed to the study including community, foundation, independent, voluntary-aided and voluntary-controlled schools. Over one hundred inspection reports were analysed and schools were chosen for visits on the basis of their effective and efficient use of resources, good management of the school's budget and good value for money. This report is also informed by an analysis of findings from all primary and secondary school inspection reports between September 2006 and July 2009.

Background

- 6 Since the introduction of Local Management of Schools legislation in 1988¹, governing bodies and headteachers have had direct control of delegated funds and make key decisions about spending priorities within their schools. The school business manager's role, working with a headteacher, is to ensure that a school manages its resources effectively and efficiently to achieve better outcomes for pupils.
- 7 The role of the school business manager has expanded significantly over recent years particularly following the introduction of 'Raising Standards and Tackling Workload: a National Agreement' (January 2003). This agreement maintained that further progress in raising standards would prove difficult unless teachers and headteachers were spared routine administrative and clerical tasks. Although business managers do not normally take on these routine tasks themselves, they often manage administrative staff who do.

¹ Local Management of Schools - The Education Reform Act (1988) gave all Local Education Authority schools wide-ranging powers to manage their affairs, including deciding how to spend their budgets and selecting their own staff.

Main findings

- 8 School business managers play an important role in securing efficiency gains and are an integral and necessary part of the leadership function in schools. School business managers contribute well to strategic leadership and nearly all demonstrate high levels of competence in a wide range of skills. In nearly all the schools visited, business managers are a valued part of the leadership team, but their salary levels vary unduly, from the equivalent of a newly qualified teacher, to that of a senior school leader. The variation in salary levels does not reflect variation in the range and challenge of the jobs they do.
- 9 School business managers provide financial advice and support to the headteacher, leadership team and the governing body and have a key role in providing budget calculations and analyses. For example, business managers work with the headteacher to prepare regular, detailed accounts of current spend against agreed budgets for governors and the local authority. Each school has its own method of preparing its budget plan. Most budget calculations include salary costs, service level agreements, insurance, projected maintenance costs and energy expenditure. Throughout the process, the headteacher and business manager usually discuss the budget closely before presenting it to governors.
- 10 Most schools in Wales do not compare their expenditure with other schools to identify potential savings. Comparisons of expenditure are most usefully made with similar schools, for example schools in the same family or in the same free school meals band. About half the local authorities in Wales enable schools to compare financial information with other schools within the authority, but the number of similar schools within an authority is often small. It is not possible to compare with similar schools from different authorities, because schools do not record expenditure in a way that is common across Wales.
- 11 Business managers often secure more efficient use of school resources. For example, one business manager effectively manages cleaning and catering contracts where staff are directly employed by the school. In another case, the business manager negotiated a money-saving deal for purchasing laptops to use a wi-fi network.
- 12 In the majority of schools, the business manager's role is wider than financial monitoring and projection alone. Their role often involves additional responsibilities such as line management of staff in relation to premises management, project management, marketing, personnel and payroll, or health and safety matters.
- 13 In many schools, the expanded role of the business manager has allowed headteachers to spend more time focusing on the curriculum and on teaching and learning. Research suggests that a good school business manager can free up at least 20% of a headteacher's time. However, the schools visited have found it difficult to evaluate the impact of the work of their business managers precisely.
- 14 Although many business managers have a range of qualifications, few have specific qualifications which relate to their professional position. Although professional

development opportunities exist for business managers many do not pursue training that result in relevant qualifications because they claim the costs are too high. In addition, there are too few opportunities for business managers to meet to share best practice.

- 15 In nearly half of the schools visited, the business manager is very experienced and is nearing retirement. At present, there is little succession planning by schools or local authorities to ensure continuity in this position. In nearly all schools there are structures in place for junior administrative staff to shadow the role on a short-term basis, but there is usually no long-term plan to ensure continuity and development.
- 16 Business managers have limited involvement in working with their equivalents in other providers to plan more efficient collaboration in delivering 14-19 provision across local networks.

Recommendations

In order to improve the effectiveness of school business managers:

Schools, local authorities and consortia should:

- R1 make the best use of school business managers by ensuring that they undertake a full range of appropriate functions;
- R2 encourage school business managers to share good practice, support one another and identify opportunities for collaboration and economies of purchasing through networks such as 14-19 partnerships and local consortia;
- R3 support school business managers to pursue appropriate training and gain relevant qualifications;
- R4 evaluate the impact of the work of the school business manager; and
- R5 consider sharing a school business manager across a cluster of small primary schools;

The Welsh Assembly Government should:

- R6 consider how best to enable schools to compare financial data with other schools across Wales; and
- R7 review the professional development needs of school business managers.

The role of school business managers

Secondary schools

- 17 In nearly all secondary schools, the school business manager is an integral part of the leadership team. Headteachers and governors have the responsibility of providing strategic vision and leadership in all aspects of budget setting and financial and premises management. The needs of different schools vary and consequently the role undertaken by business managers varies. However, in nearly all schools, the business manager provides support for senior managers through financial reporting and analysis, salaries management, strategic project management, preparing and interpreting financial statements and making financial projections.
- 18 The role of the business manager in many schools includes accounting for all financial income and outgoings. Business managers manage the delegated budget share, any extra funds raised and the costs of extra-curricular activities. Working with the headteacher and governors, they prepare an annual budget. This includes the preparation of estimates and the subsequent monitoring and profiling of expenditure.
- 19 In most schools, the business manager:
- works with the headteacher to prepare a budget for the coming financial year based on the school development plan;
 - records, monitors and analyses the school's budget using the school's financial procedures that are in accordance with audit requirements;
 - prepares and presents financial statements to the headteacher, governors and the local authority;
 - advises staff involved in financial processes within the school, for example, heads of departments, who must follow school and audit guidelines when ordering resources;
 - works with the leadership team and governors on income generation and forward planning;
 - manages and monitors contracts, tenders and agreements for the provision of support services and ensures that the headteacher and governors are appropriately involved in decisions;
 - works with the site manager to monitor energy costs;
 - monitors accounting procedures for ordering, processing and payment of goods and reconciles bank accounts on a monthly basis;

- prepares financial returns for the local authority and the Welsh Assembly Government within the required deadlines;
 - ensures that the school's Value Added Tax liabilities are paid in accordance with current tax legislation;
 - prepares invoices and seeks legal advice to recover bad debts;
 - administers the Education Maintenance Allowance scheme for post-16 students, where relevant;
 - works with the headteacher and the leadership team to seek additional funding for the school; and
 - maximises income from letting the school's facilities outside school hours.
- 20 In many schools, the business manager is also responsible for school meals monies. If the school organises its own meals service then this may involve payment for supplies, maintenance of equipment, management of catering staff and ensuring that health and safety legislation is met. If the school uses the local authority catering service the business manager is often responsible for ensuring that the money is banked correctly following local authority audit guidelines and for the maintenance and purchase of school kitchen equipment.
- 21 In many secondary schools, the business manager manages a range of non-teaching staff and oversees their performance management. The number of staff employed in secondary school administration teams has now typically increased to include an examinations officer, a data officer and a clerical assistant who organises cover for absent staff. In many schools, the business manager is also the manager of all clerical staff and also manages the ICT network manager.
- 22 In addition, they link with the personnel department of the local authority to organise Criminal Record Bureau checks and to inform them of salary information changes, including leavers, maternity cover, staff sickness and new staff.
- 23 The business manager is often responsible for the overall management and maintenance of school buildings, facilities and grounds. Many schools employ a site manager, who is often managed by the business manager. In addition, the business manager works alongside the local authority in drawing up specifications, obtaining tenders and liaising with building contractors and architects, when necessary.
- 24 Aspects of health and safety are often part of the business manager's role. This responsibility involves carrying out and reviewing risk assessments and ensuring that fire equipment is properly installed and maintained.
- 25 In a number of secondary schools visited, business managers act as clerks to governing bodies and distribute agendas and related papers and complete the minutes of meetings.

Primary schools

- 26 The number of primary schools that employ a school business manager is increasing. The financial role of school business managers in primary schools is similar to that in secondary schools, and typically involves:
- working with the headteacher to prepare a budget for the coming financial year based on the school development plan;
 - recording, monitoring and analysing the school's budget using school financial procedures that are in accordance with audit requirements;
 - preparing and presenting financial statements to the headteacher, governors and the local authority; and
 - monitoring accounting procedures for ordering, processing and payment of goods and reconciling bank accounts on a monthly basis.
- 27 A few local authorities introduced business managers into primary schools some years ago, although there are variations in the way this operates. All schools have control of their budget and in some schools the local authority arranges for payment of invoices once they are authorised. There are other primary schools that manage their own budgets by being a 'cheque book school'².
- 28 Business manager roles in primary schools are very similar to those in secondary schools in relation to supporting how the headteacher and governors manage the school budget. The administrative officer supports the headteacher in preparing the budget and has significant responsibilities for ordering, processing and paying for goods. In addition, these officers are responsible for the reconciliation of bank accounts on a monthly basis. In the primary schools where this role exists, headteachers have more time to focus on learners. In those primary schools, where this role does not exist to support the headship function, headteachers often have difficulty in identifying time for Planning, preparation and assessment³.
- 29 There are good examples of schools sharing a school business manager. In Carmarthenshire, for example, primary schools in Bancyfelin, Llangain, Llanstephan and Peniel share the costs of a school support officer. Each school provides an office where the support officer works for one day a week. In this case, the school support officer manages the budget throughout the year, orders and pays for equipment, supports the headteacher setting the budget, and clerks for the governing body. Previously, the support officer was based in the local authority offices, but it was felt that having the support officer based at the school was more effective because it enabled them to resolve and identify any issues as they arose on-site.

² A cheque book school manages its own bank account into which its budget share is paid; all invoices received can then be paid by cheques. In addition, schools can retain all interest paid on these accounts.

³ See 'Evaluation of the extent and impact of remodelling on learning and the school workforce', Estyn, April 2009

The effectiveness and impact of school business managers

- 30 Overall, school business managers contribute well to the strategic leadership of schools. In nearly all the schools visited, business managers demonstrate high levels of competence in a wide range of skills including strategic planning, interpersonal skills, expertise in financial systems, the ability to interpret data, and ICT skills. In addition, business managers are often meticulous, organised and systematic. They communicate budget information well and enable headteachers and governors to make informed decisions about the best use of resources.
- 31 In the schools visited, business managers contribute well to strategic planning and are a valued part of the leadership team. Although business managers have similar responsibilities, their salary levels vary unduly between schools from the equivalent of a newly qualified teacher's salary to that of a senior school leader.
- 32 In the best examples, business managers bring significant advantages to a school. These advantages include:
- financial management and benchmarking to ensure efficiency and effectiveness;
 - the use of three to five-year budget projections to inform strategic planning;
 - knowledge of suppliers and negotiation skills to help achieve value for money;
 - timely use of legal advice; and
 - the availability of a different perspective from that of teachers within the school since most business managers come from a non-teaching background.
- 33 In most schools, the business managers help to ensure that the school provides value for money from its budget by making savings and by identifying new sources of funding. Business managers have negotiated savings in purchasing resources and identified more efficient methods of delivering services. In one school, for example, the business manager negotiated a large discount on hardware and installation of a new IT network which saved the school a lot of money.
- 34 The following examples of cost savings have been identified during the study and illustrate the effectiveness of a business manager's role in ensuring value for money. The illustrations below are not unique and a number of schools across Wales will have similar examples. They include:
- identifying savings by using better tendering and procurement procedures; (Ysgol Y Moelwyn and St. Joseph's Catholic and Anglican Secondary School)
 - introducing a cheque book management system, which allowed a school to gain an additional £76,000 over many years through bank interest payments (Corpus Christi Catholic High School);

- paying contractors promptly; resulting in better relationships and the negotiation of better rates; (Milford Haven School)
- saving £250 per calendar month by re-negotiating phone charges; (Whitchurch High School)
- tendering for a grounds maintenance contract that has substantially improved quality and reduced costs; (St. Alban's RC High School)
- close monitoring of gas, electricity and water charges which has seen one school become the most energy efficient school within the local authority; (Milford Haven School)
- working with the procurement section of the local authority to secure a lower price for computers, photocopiers and stationery; (Milford Haven School, Ysgol Gyfun Y Strade and Whitchurch High School)
- generating income from community use of the school for drama productions and sports; (Monmouth School) and
- negotiating a new lease for school photocopiers that was less expensive. (Monmouth School)

Case study 1: Coedcae Comprehensive School, Carmarthenshire

Improving its computer network through the effective use of resources.

This large 11-16 South Wales comprehensive school wanted to improve its computer network. Identifying suitable accommodation for computer suites was problematic because of a shortage of classroom space. As a result, the school looked for a solution within departments.

The school approached a number of computer companies to cost a computer network. The school installed a wi-fi⁴ network to use a large number of laptops on mobile trolleys that can easily be moved around the school. Technicians manage the resources which can be used by all departments within subject classrooms. As a result, the school saved thousands of pounds due to the strategic planning of the leadership team and the negotiating skills of the business manager.

⁴ A wi-fi enabled device such as a computer can connect to the Internet when within range of a wireless network. The coverage of one or more interconnected access points can comprise an area across a whole school and support pupils by saving their work on a central server or by accessing the internet.

Case study 2: Milford Haven Comprehensive School, Pembrokeshire

Improving the efficiency and effectiveness of the schools budget through careful monitoring and use of resources

This large 11-18 secondary school wanted to ensure that it provided value for money through careful monitoring of the school budget. The school monitored all expenditure within its budget closely to identify potential savings.

By careful monitoring of energy costs and the installation of energy saving devices, the school business manager ensured that the school became the most efficient in the local area. Procurement of computers has ensured a saving of £100 per computer without loss of quality. In addition, the business manager has successfully applied for almost £60,000 of grants in recent years.

Case study 3: Llanfyllin High School, Powys

Improving value for money whilst ensuring the quality of service provided to the school does not decline

This medium-sized rural 11-18 secondary school wanted to ensure value for money in services provided to the school. The newly appointed business manager investigated all aspects of the school budget to look for places where efficiency gains might be made.

For example, the school investigated the possibility of managing the schools cleaning services and also providing a school meals service for pupils. The business manager now manages both services and each now makes a profit without any loss of quality. This in turn contributes to the school budget and increased the resources available to the school. The catering service uses local produce and this has added to the quality of food in the canteen.

- 35 Most schools in Wales do not compare their expenditure with similar schools to identify potential savings. Comparisons of expenditure are most usefully made with similar schools, for example schools in the same family or in the same free school meals band.
- 36 All local authorities within Wales receive a budget outturn statement from their primary and secondary schools. About half of local authorities⁵ share some of this financial data with schools. However, there are a number of ways in which this information can be used with schools. The majority share financial data anonymously, whereas others discuss the data at headteachers meetings. A few local authorities provide information to schools when they receive a request for it. Only one local authority publishes school financial data on the internet for comparison purposes. Other authorities have tried to share data, but have found it

⁵ Blaenau Gwent, Caerphilly, Cardiff, Flintshire, Merthyr Tydfil, Monmouthshire, Powys, Rhondda Cynon Taff, Newport, Swansea, The Vale of Glamorgan, Torfaen and Wrexham

difficult for meaningful comparisons to be made because of the size of the local authority. It is not possible for schools to compare their financial situation with similar schools from different authorities, because schools do not record their expenditure in a way that is common across Wales.

- 37 Many headteachers do not have the detailed training or experience to manage financial and other resources within a school. Business managers often have a financial background. This experience enables them to construct long-term financial plans and models for whole-school improvement. Business managers, through their expertise in finance, personnel and resource management, support headteachers to ensure that the budget can be used efficiently to improve standards.
- 38 In nearly all schools, business managers provide effective support and guidance to headteachers and governors. For example, business managers research legal issues and ensure that the school meet local authority financial guidelines. In addition, business managers often provide an informed strategic perspective and contribute effectively to the senior leadership team.
- 39 In many schools, the number of support staff has increased significantly since the introduction of the 'Raising standards, reducing workload' initiative. Business managers in the schools visited were well placed to lead, manage and develop the skills of support staff through effective performance management and staff development processes.
- 40 Overall, in nearly all schools, the role of the business manager has allowed headteachers to spend more time focusing on school leadership, the curriculum and on teaching and learning. Recent research⁶ suggests that employing a good school business manager can free up at least 20% of a headteacher's time. However, many schools do not evaluate the impact of the work of their business managers in terms of cost efficiencies, time saved by other senior managers and any consequent improvements in pupil outcomes.
- 41 The business manager's role in schools continues to develop. National policies such as Learning Pathways 14-19 are resulting in increasing collaboration between schools. However, in the secondary schools visited, business managers had limited involvement in working together across different providers to ensure these collaborative arrangements are delivered in the most efficient and effective way. Collaboration has a number of advantages for business managers and schools in making efficiency gains. These advantages include:
- business managers working together to identify ways of buying resources in bulk;
 - sharing good practice to make efficiency gains;
 - identifying ways to share resources between schools;

⁶ National College of School Leadership (NCSL) Survey, 2009

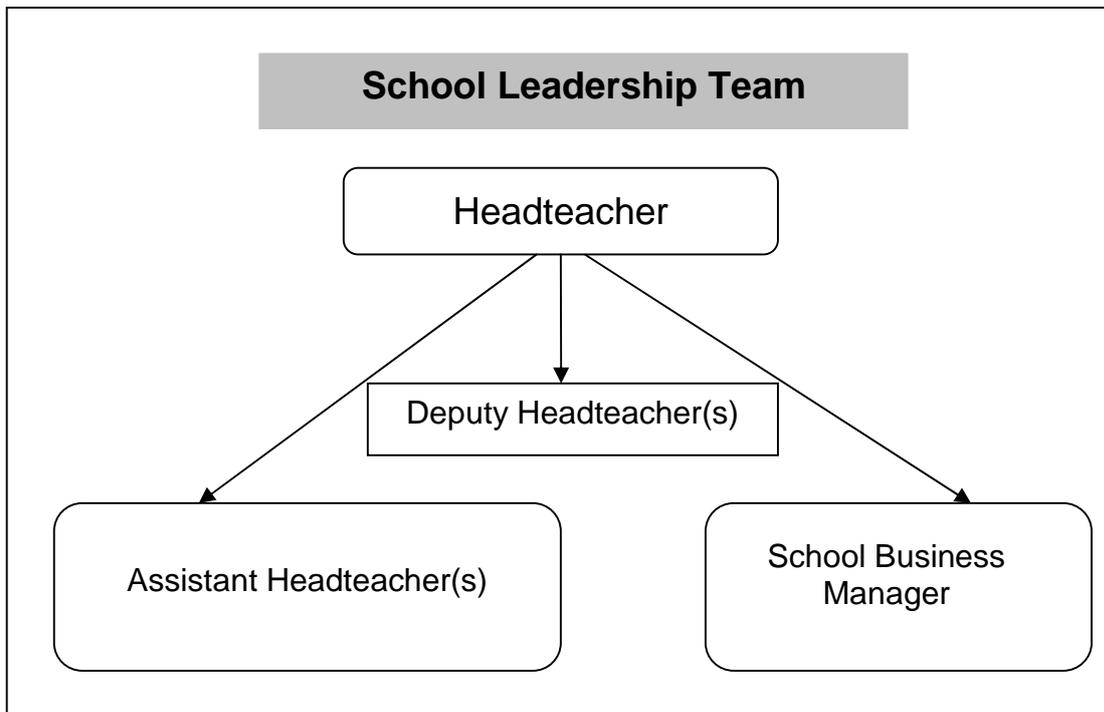
- the opportunity to operate strategically and analytically across a network of schools;
- greater awareness of current and emerging trends and developments in the delivery of education;
- development of interpersonal skills and sharing of effective and consistent working practices with governing bodies and headteachers;
- support for ensuring compliance with all legal and regulatory requirements; and
- contributing to and developing a shared culture of efficient governance across a number of schools.

The professional qualifications and development of school business managers

- 42 School business managers have a wide range of qualifications which range from being qualified accountants to HND and A Level qualifications in a number of different subject areas. Very few school business managers have recognised qualifications in school business management. Business manager qualifications that cover the range of competencies and skills of the role have existed for a number of years through the National College of School Leadership, with recognised qualifications such as the Certificate of School Business Management and the Diploma of School Business Management. However, the high cost of courses leading to these qualifications is a barrier to the pursuance of these qualifications by school business managers in Wales.
- 43 Professional development opportunities for business managers are increasing. One professional organisation for headteachers and deputy headteachers has broadened its membership. As a result, this organisation is holding its first annual conference for business managers this year. In addition, the Training and Development Agency and National College of School Leadership held an international conference in 2009 with the title 'Achieving world class schools: in search of excellence – exploring the impact of the school business manager'. These events are starting to increase opportunities for business managers to develop their skills and share practice. Only a few local authorities organise formal or informal meetings for school business managers. As a result, schools develop their own expertise and look to one another for help and advice. Business managers in the independent school sector have a strong support network through the Independent Schools' Business Managers Association. Where such networks exist, business managers discuss a wide range of issues which support the development of their schools.
- 44 In a number of schools visited, the business manager is very experienced and is nearing retirement. At present, there is little succession planning by schools or local authorities to ensure continuity in this position. In some instances, there are arrangements in place for junior administrative staff to shadow the role on a short-term basis, but there is usually no long-term plan to ensure continuity and development.

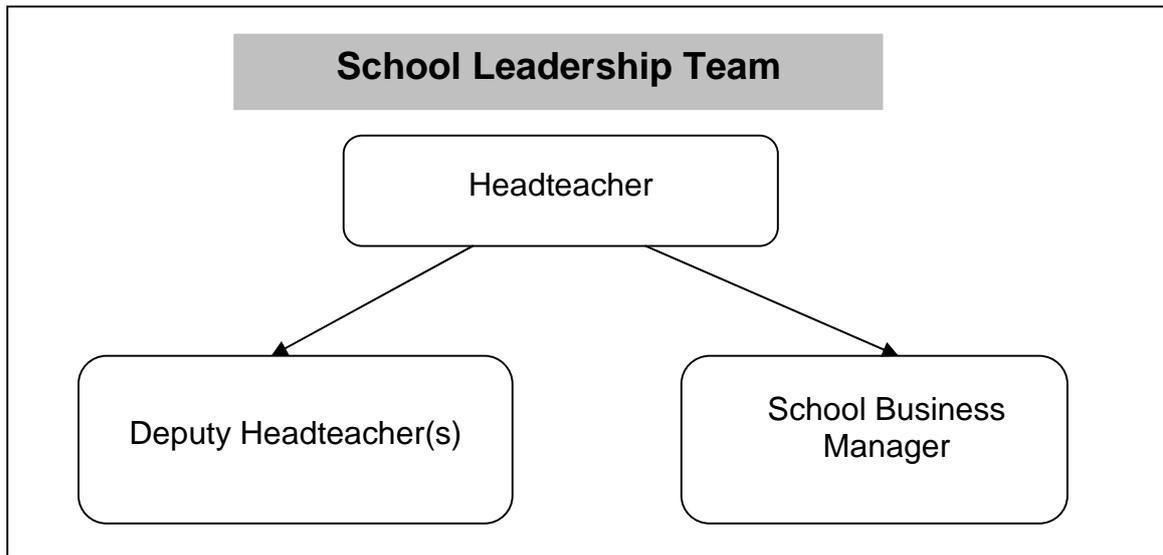
The deployment of school business managers

- 45 The models below⁷ show how business managers are deployed in the schools in this study. With only one exception, the secondary schools in the study use one of the first two models of deployment below. Advantages of these models include:
- being part of the senior management team to provide first hand support to the headteacher;
 - the ability to be part of any discussion or debate that might occur; and
 - the ability to offer an alternative perspective since the majority of school business managers are not from a teaching background.
- 46 The business manager is an integral part of the leadership team and is involved in strategic and project planning across a number of areas of responsibility.

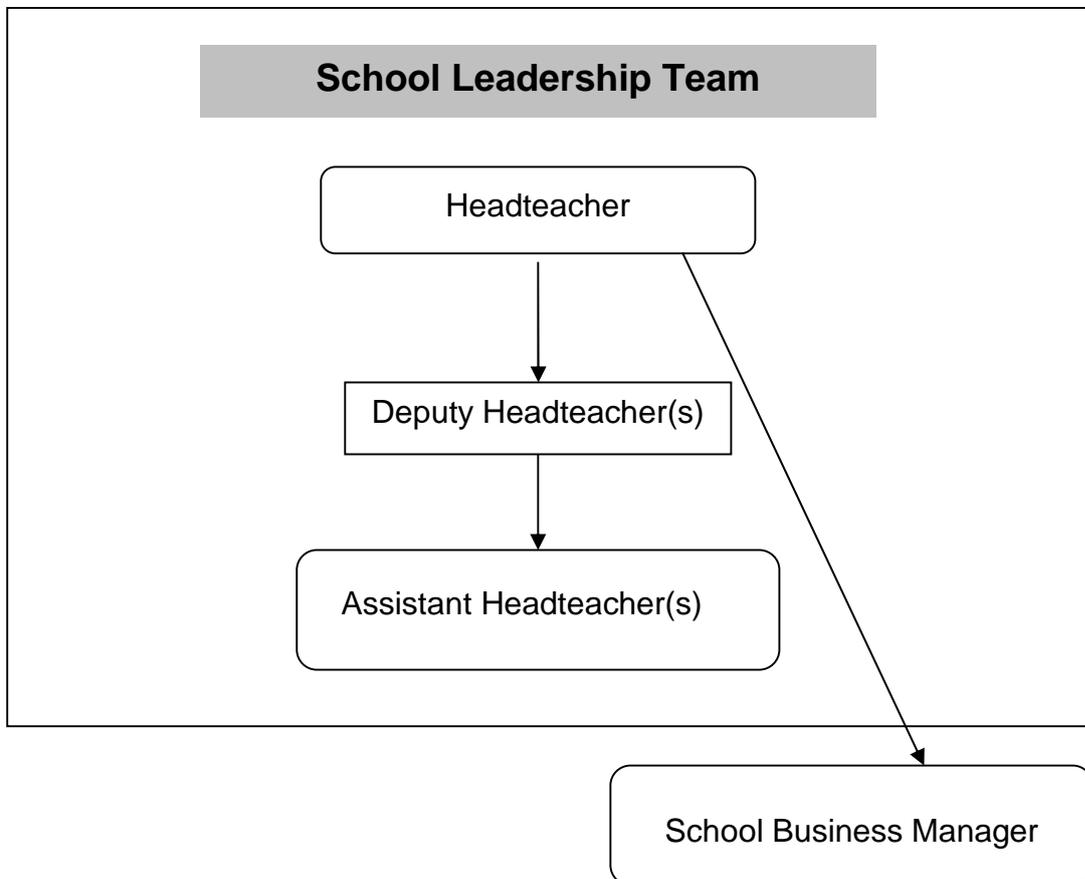


⁷ Discover the benefits of school business managers, NCSL, 2008

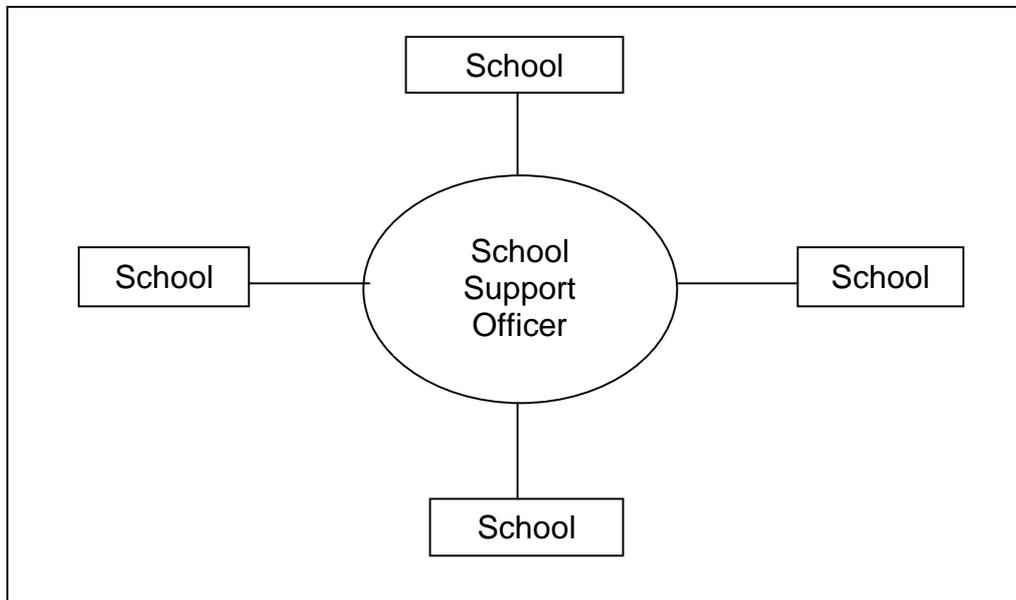
- 47 In this model, the business manager has equal status with a deputy headteacher. Again, their role includes strategic and project planning across a number of different areas of responsibility.



- 48 Very few schools use a model for deployment where the business manager is not part of the leadership team. Although the business manager may work alongside the headteacher, they are not involved in the strategic planning and decision-making processes within the leadership team. In the schools studied only one school used this model.



- 49 This model has been described as a peripatetic⁸ school support officer and is typically used across a number of primary schools where individual schools are not large enough to employ their own support officer. The salary is shared between the primary schools. This deployment of the support officer allows the expertise and best practice to be shared across a number of schools.



- 50 In small primary schools, the fourth model is a particularly effective method of deploying a school business manager because it enables schools to share the expertise of a school business manager across a number of schools. In these small schools, shared business managers are an integral part of the school, supporting the headteacher and governors in setting the budget. In addition their role often includes being clerk to the governing body and transferring assessment and pupil data to the local authority.

⁸ Discover the benefits of school business managers, NCSL, 2008

Appendix 1: List of schools visited

The following schools were part of the survey:

Community schools

Bishopston Comprehensive School
Blackwood Comprehensive School
Bryn Celynnog Comprehensive School
Castell Alun School
Coedcae School
Llanfyllin High School
Milford Haven School
Pontardulais Comprehensive School
Whitchurch High School
Ysgol Gyfun Dyffryn Taf
Ysgol Gyfun Ddwyieithog Y Preseli
Ysgol Gyfun Y Strade
Ysgol Maes Garmon
Ysgol Y Moelwyn

Voluntary aided schools

Corpus Christi Catholic High School
St. Alban's R.C. High School
St. Joseph's Catholic and Anglican Secondary School

Foundation schools

Brynmawr Foundation School
Cwmcarn High School

Independent schools

Monmouth School
St. Clare's School

Primary schools

Bancyfelin C.P.School, Carmarthen
Ferryside V.C.P. School, Carmarthen
Llangain C.P. School, Carmarthen
Richmond Park Primary School, Carmarthen
Ysgol Llanstephan, Carmarthen
Ysgol Gynradd Peniel

Appendix 2: Types of schools

Community school	In a community school the local education authority owns the land and buildings, funds the school, employs the staff and provides support services but the governing body is responsible for running the school and can decide which support services to buy into. The pupils have to follow the National Curriculum.
Voluntary aided school	Voluntary aided schools are usually called religious schools or faith schools. In a voluntary aided school the land and buildings are normally owned by a charity, often a religious organisation such as a church, but the governing body is responsible for running the school. The school is funded partly by the local education authority, partly by the governing body and partly by the charity. The governing body employs the staff and the local education authority provides support services. The pupils have to follow the National Curriculum.
Voluntary controlled school	A voluntary controlled school can also be called a religious or faith school. In a voluntary controlled school the land and buildings are owned by a charity, often a religious organisation such as a church. The charity appoints some of the members of the governing body, but the local education authority is responsible for employing the staff and funding and running the school. The pupils have to follow the National Curriculum.
Foundation school	In foundation schools the land and buildings are owned by a governing body, who are also responsible for running the school, employing the staff and administering most of the support services although the local education authority funds the school. The pupils have to follow the National Curriculum.
Independent school	An independent school is not financed by taxpayers or through the taxation system by local or national government, and is instead funded by private sources, predominantly in the form of tuition charges, gifts and long-term charitable endowments. Independent schools are free to select their pupils. Pupils do not have to follow the National Curriculum.

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Appendix 4: The remit author and survey team

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