

School business manager: developing the role



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Introduction

There is an ongoing 'revolution' in the running of UK state schools and this is making the position of the school business manager (or bursar) both significant and necessary. Government thinking, together with profound changes in society generally, will affect every institution both in terms of pedagogy and the physical environment, particularly technology and levels of security employed.

This course will look at how you – an existing or aspiring business manager – can work effectively to support school activities and stakeholders, and in particular how you can support and manage aspects of the change agenda in your school to improve teaching and learning outcomes.

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Learning Outcomes

After studying this course, you should be able to:

- review a job description for a business manager that takes account of today's context
- understand how a business manager can support teaching and learning and all stakeholders
- understand and use a range of analytical tools
- apply these analytical tools to your school's situation, in particular responding to government agendas
- understand how benchmarking data can be used to compare and contrast expenditure and resource management.

1 A revolution in schools

The school we are in today will not be the school we are in tomorrow. This is especially apparent when the government's Extended Schools and Every Child Matters agendas for English schools are added to the mix, together with remodelling and the changes to the 14 – 19 phase. For details of the bursar's key role in this process visit [Bursar's role in remodelling](#) [accessed 26 January 2007].

Admittedly, there is no 'one size fits all' business manager (or bursar) role. The position and responsibilities vary immensely between schools. So, to begin, turn to [Activity 1](#) to assess where you are now.

Activity 1

Compare your job description with the following resources, which can be found by clicking on the 'view document' links below:

- My job description (course author)
- The range of duties of business managers from O'Sullivan, Thody and Wood.
- Suggested bursar basic functions from DfES (2004) *Looking for a Bursar*.
- You may also like to review the bursar modular job description from DfES (2004) *Looking for a Bursar*.

Click here to read a job description

[View document](#)

Click here to read Bursars' expected roles from O'Sullivan, Thody and Wood.

[View document](#)

Click here to read about the functions of a Bursar

[View document](#)

Click here to read a job description for a Bursar

[View document](#)

- Are there any differences?
- What would account for these?
- Does your job description adequately reflect the strategic role and short-, medium- and longer-term objectives?
- Is there a clear difference between responsibilities and specific accountabilities?

Make notes on areas where you feel your job description may benefit from amendment.

At the end of the course, you may wish to revisit your job description in light of the activities you have completed.

2 How can you predict the future?

2.1 Looking forward

Because it is easy to explain things looking backwards, we think we can then predict them forwards. It doesn't work, as many economists know to their cost. The world keeps changing. It is one of the paradoxes of success that the things and the ways which got you where you are, are seldom the things to keep you there. If you think that they are, and that you know the way to the future because it is a continuation of where you've come from, you may well end up in Davy's Bar, with nothing left but a chance to drown your sorrows and reminisce about times past.

Charles Handy, 1994

What tools can we use to help us provide an education that prepares our students for their future?

Davies and Ellison have identified ten key re-engineering trends for schools, which are summarised below.

Click on 'view document' below to download an animation

Interactive content is not available in this format.

Many of these trends are beginning to show through already. Of course, these can be added to by each school as it sees fit. The contents of Every Child Matters, Extended Schools and workforce reform, for example, are found in the above-mentioned trends. Any one of these key trends can be analysed using a range of tools.

Any meaningful analysis, however, must be part of a process – it cannot be done quickly or easily or as a 'one-off'. In my own school, a 'strategy group' of members of the leadership team was set up to 'think the unthinkable'. Davies and Ellison (1999) suggest setting up a 'futures group'. Look at the document in which the two authors list a simple matrix to guide you by clicking on 'view document' below.

Click on 'view document' below to read Futures Group Matrix

[View document](#)

Another useful tool in understanding the natural life cycle of an organisation is the Sigmoid curve, as described by Handy (1995). Read the explanation in the document below.

Click on 'view document' below to read The Sigmoid Curve

[View document](#)

Now turn to Activity 2 to look more closely at Davies and Ellison's suggestions.

Activity 2

Preferably with colleagues, take any one of the trends identified by Davies and Ellison (or one of your own) and complete the matrix found at the end of the document called **Futures Group Matrix** (Click on 'view document' below).

Click here to access Futures Group Matrix

[View document](#)

- If possible, discuss your findings with senior colleagues.
- What implications do you see?

2.2 Analytical tools

To take matters forward, Davies and Ellison suggest the use of analytical tools to assist with practical target setting when data and information have been collected. They suggest some tools including 'Boston Growth Matrix' from the Boston Consulting Group and Little's 'Lifecycle portfolio matrix'.

Perhaps most readers will be familiar with a SWOT analysis – strengths and weaknesses are usually internal while opportunities and threats are regarded as external factors. Davies and Ellison have modified this to include a macro approach and have included sub-categories to make the tool more sophisticated.

Explore this tool in [Activity 3](#) now.

Activity 3

Look at the case study for Shrewbridge School by clicking on 'view document' below. Now, draw up your own macro SWOT using the template also under the 'view document' link below. Add any other sub-categories you feel are relevant.

Click here to read Shrewbridge School case study

[View document](#)

Click here to read Building a macro SWOT for a school

[View document](#)

This will help you identify what needs to be done. It would be good to do this in relation to, one such issue as, the Extended Schools agenda or workforce reform by talking to different groups within the school (such as governors, senior management team (SMT), middle leaders, parents, pupils). This would give you a school-wide overview and would probably generate valuable discussion!

3 Extending services into the future

3.1 The Extended Schools initiative

The last few years have seen a plethora of initiatives for English schools: two significant initiatives are 'Extended Schools' and the 'Every child Matters'. What are the implications for a business manager?

Government thinking places schools at the centre of local provision for a wide range of options, from health centres to full community facilities. These 'extended schools', as the government terms them, offer an opportunity for schools to contribute to and work more closely with their communities.

Click on the links below:

Extended Schools: providing opportunities and services for all and

Extended schools: access to opportunities and services for all [accessed 26 January 2007]

for more information on the services schools may be expected to provide.

At my school, for example, our sports centre operates seven days a week. Its activities are summarised below, in a presentation to our governors:

Click on 'view document' below to download King Edward VII Sports Centre Community Use Report for 2005

[View document](#)

3.2 The Every Child Matters agenda

The government's vision for extended schools builds on the Every Child Matters (ECM) initiative. Click on the following links for more information Every Child Matters: Change for children in schools [accessed 26 January 2007]. It is founded on five outcomes:

- Be healthy.
- Be safe.
- Enjoy and achieve.
- Make a positive contribution (as a citizen).
- Be employable.

In moving towards these five outcomes, our school is conscious of the thinking that lies behind them, including:

- Opportunities for students are not always equal.
- Occasionally individuals 'fall through' the gap between agencies.
- Inappropriate/abusive behaviour, including problems with drugs and alcohol.
- Children 'in need' of specialist support and the difficulties that can arise in obtaining such support.

3.3 Responding to these initiatives

A key implication of both initiatives is greater interagency working, which necessitates more engagement of school staff with other professionals.

The DfES notes in *Extended Schools: Providing Opportunities and Services for all* that schools will need to work in partnership with other groups and agencies to enable:

- more diverse activities that involve parents, community members and local groups;
- a 'joined-up' approach to local services by involving the local authority, local agencies and partnerships;
- services that require specialist skills, such as healthcare or social services;
- sustainable programmes where activities and services are not over-dependent on the skills and time of a few key staff;
- opportunities for services that have a different ethos from school activities and present themselves as 'teacher-free' zones.

Explore how your school is responding to one of these initiatives in Activity 4.

Activity 4

It is outside the scope of this course to suggest you draw up an action plan for implementing your school's response to the government's initiatives. There are , however, core questions that you can address:

- What are you doing already?
- What's possible?
- What are your local community's needs?
- Who needs to be consulted?
- What agencies will you need to work with?
- What funding is available?
- What data will you need? Where can you get it?

Using one of the analytical tools identified in Section 3, assess your school's response to the Extended School's initiative or any other pertinent initiative. Where does this leave you?

4 Putting plans into action

In part, the business manager can and should be an 'educational resource manager'. By having someone who concentrates on areas such as administration, facilities management or human resources, it allows others to focus on teaching.

When I applied for the post of business and community manager, the advertisement specified that the successful candidate would have 'an empathy and understanding of comprehensive education'.

The head explained after my appointment that he did not want someone from industry or commerce who 'knew the cost of everything and the value of nothing'. Rather, he wanted someone who would fit with the ethos of the school, its staff, pupils and local community.

Crucially, the business manager should take part in, or at least be aware of, SMT deliberations regarding teaching and learning priorities – timetable and curriculum changes and other 'big picture' aspects of the school – in order that he/she can help ensure that the hidden work underpinning this 'big picture' is in place. For example, identifying timelines, financial resources, actions and activities for internal and external staff to ensure the correct classroom equipment, décor, ICT infrastructure etc. are in place in an effective, efficient, academic and timely manner.

Developments such as consistent financial reporting and other comparison methods can help you compare and contrast expenditure. Be warned, however, that it is essential to ask key questions – who, what, when, where, how and why – in relation to differences and similarities.

4.1 Where to find support

There is a range of tools available to support you, including:

- The DfES financial management standard [accessed 26 January 2007]. See especially the guidance on the role of bursar [accessed 26 January 2007].
- Teachernet school finances webpage [accessed 26 January 2007].
- Schools Audit Commission [accessed 26 January 2007].
- DfES Value for money [accessed 26 January 2007].

Go to Activity 5 now to look at how you can support your leadership team's priorities.

Activity 5

Look at the personal account of how my school developed a Campus Asset Management Plan by clicking on the 'view document' links below. This involved after campus-wide consultation and was approved by the head and governors.

Click here to download an extract from CAMP

[View document](#)

Click here to download Development of the Campus Asset Management Plan

[View document](#)

Take one of the issues identified in the CAMP that is also applicable to your school and map out how you identify:

- budget considerations;
- stakeholders' views;
- scheduling implications;
- leadership approval process.

Sketch a plan of action for how you will gather the necessary information and views, detailing who, when and how.

Conclusion

I hope this course has made clearer what a business manager can do to impact positively on the school and its core function of teaching and learning as we move forward into a changing future.

You may now find it helpful to revisit your job description and the notes you made in Activity 1.

Equally, through some of the new developments that are taking place in society, the school itself will need business management in order to best position itself to help pupils, parents and communities.

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Further reading

NCSL Bursar Development Programme

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