

References

- Anderson, G, with Arsenault, N, 1998, *Fundamentals of Educational Research 2nd Edition*, London, Routledge Falmer
- ASCL (Association of School and College Leaders), 2006, *The Future of School Leadership*, ASCL Policy Paper 25, Leicester, ASCL
- Attwood, T, 2006, *Increasing the Efficiency of School Administration*, Corby, First and Best in Education
- Bennett, N, & Miles, S A, May 2006, *Second in Command: the misunderstood role of the chief operating officer in Harvard Business Review*, 71-78
- Bennett, N, Wise, C, Woods, P, & Harvey, J, 2003, *Distributed Leadership*, Nottingham, NCSL
- Blair, T, 2005, DfES
- Bubb, S, & Earley, P, 2004, *Managing Teacher Workload: work-life balance and wellbeing*, London, Paul Chapman Publishing
- Butt, G, & Lance, A, 2005, *Secondary teacher workload and job satisfaction: do successful strategies for change exist?* in *Educational Management Administration and Leadership*, 33, 4: 401-422
- Campbell, J, 2006, *A strategic move in Education Executive*, 16, 16-19
- Coulbeck, J, 2006, *School business managers: the emergence of a new profession?* in *Professional Development Today*, 9, 3, 14-19
- Cohen, L, Manion, L, and Morrison, K, 2000, *Research Methods in Education 5th Edition*, London, Routledge Falmer
- Court M, 2004, *Talking back to New Public Management versions of accountability in education: a co-principalship's practices of mutual responsibility in Educational Management Administration and Leadership*, 32(2):171-194, London, Sage
- Davies, B, (ed), 2007, *Developing Sustainable Leadership*, London, Paul Chapman Publishing.
- Department for Education and Skills, 2006, *School Workforce in England – (Statistical First Release No: SFR 18/2006)*, London, DfES
- DfES 2005, *Higher Standards, Better Schools for All – more choice for parents and pupils: Education White Paper*, London, DfES
- Department for Education and Skills, 2005, *Statistics of Education: Education and Training Statistics for the United Kingdom*, London, TSO
- Department for Education and Skills, 2004, *Every Child Matters*, London, DfES
- Department for Education and Skills, 2003, *Looking for a Bursar?*, London, DfES
- Department for Education and Skills, 2002, *Cutting Burdens; good practice in cutting bureaucracy*, London, DfES

- Earley, P, & Bubb, S, 2004, *Leading and Managing Continuing Professional Development: developing people, developing schools*, London, Paul Chapman Publishing
- Eisinger, P K, & Hula, R C, 2004, *Gunslinger School Administrators: Nontraditional Leadership in Urban School Systems in the United States*, in *Urban Education*, 2004, 39, 6: 621-637
- Everett, R, Lows, R, & Johnson, D, 1996, *Financial and Managerial Accounting for School Administrators*, Reston VA, Association of School Business Officials (International)
- Freidson, E, 2001, *Professionalism: the third logic on the practice of knowledge*, Chicago, University of Chicago Press
- Fullan, M, 2006, *Turnaround Leadership*, San Francisco, Jossey Bass
- Fullan, M, 2005, *Leadership and Sustainability: systems thinkers in action*, Thousand Oaks, Corwin Press
- Gabbittas Educational Consultants, 2004, *The Independent Schools Guide*, London, Kogan Page.
- Glover, I and Hughes, M., (eds), 1996. *The Professional Managerial Class; Contemporary British management in the pursuer mode*, Aldershot, Avebury
- Gronn, P, 2002, *Distributed Leadership*, in Leithwood, K, Hallinger, P, Seashore-Louis, K, Furman-Brown, G, Gronn, P, Mulford, W and Riley, K (eds) *Second International Handbook of Educational Leadership and Administration*, Dordrecht, Kluwer
- Gunter, H, Rayner, S, Thomas, T, Fielding, A, Butt, G, & Lance, A, 2005, *Teachers, time and work: findings from the evaluation of the transforming the school workforce pathfinder project*, in *School Leadership and Management*, 25, 5: 441-454
- Hargreaves, A, & Fink, D, 2007, *Sustaining Leadership*, San Francisco, Jossey Bass.
- Harris, A, Brown, & Abbott, I, 2006, *Executive leadership: another lever in the system?*, in *School Leadership and Management*, 2006, 26, 4:397-on
- HMCI, 2006, *Ofsted Departmental Report 2005-06*, Norwich, HMSO.
- Hopkins, D, 2006, *Every School a Great School: meeting the challenge of large scale, long term educational reform*, London, Specialist Schools and Academies Trust (Inaugural Lecture at the launch of the London Centre for Leadership in Learning, Institute of Education, University of London)
- IRU, 2006, *Implementation Review Unit Statement for 2006*, London, DfES
- Keating, I & Moorcroft, R, 2006, *Managing the Business of Schools*, London, Paul Chapman
- Knight, J, 18 January 2007 DfES Press Release Response to 'A New Approach To School Leadership: Independent Report'. http://www.dfes.gov.uk/pns/DisplayPN.cgi?pn_id=2007_0011
- Handy, C, 1994, *The Empty Raincoat: making sense of the future*, London: Hutchinson.

- Lincoln, Y S, & Guba, E G, 1985, *Naturalistic Inquiry*, Beverley Hills, Sage Publications.
- Moorcroft, R, & Summerson, T, 2006, *Leaders backing leaders: a programme of school business management in Journal of In-service Education*, 2006, 32, 2: 255-274
- Morris, E, 2001, *Professionalism and Trust – the future of teaching and teachers* in a pamphlet accompanying Estelle Morris's speech to the Social Market Foundation, November 2001
- Munby, S, 2005, *Leadership in Complex Schools*, Nottingham, NCSL
- NCSL 2007, *Impact and Evaluation Report*, Nottingham, NCSL
- NCSL, December 2006, <http://www.ncsl.org.uk/programmes/bdp/videos.cfm>
- NCSL 2005, *Impact and Evaluation Report 2004/05*, Nottingham, NCSL
- O'Sullivan, F, Thody, A & Wood, E, 2000, *From Bursar to School Business Manager: Reengineering Educational Resource Management*, London, Financial Times Pittman.
- PricewaterhouseCoopers, 2007, *Independent Study into School Leadership: Main Report*, London, DfES
- PricewaterhouseCoopers, 2001, *Teacher Workload Study*, London, DfES
- PricewaterhouseCoopers, 2006, *Independent Study into School Leadership: Main Report*, London, DfES
- Rae, J, 1993, *Delusions of Grandeur*, London, Harper Collins.
- Stansfield, A., 2006, 'A journey of professional learning', in *Professional Development Today*. 9,3, 24-27.
- The Workforce Reform agenda and NCSL's CSBM and DSBM training programmes reaching over 4,000 school business managers (TDA News Release 12th July 2006).
- Training and Development Agency, 2006, *Looking for a Bursar?*, London, DfES
- Wood, E, 2007, Bursar or School Business Manager: is it time to decide? In *Just4SBMs*, 13, 18-21.
- Wood, E, 2006 (a), *Glass ceiling or comfy armchair? Gender and professionalism in school business management*, in *Just4SBMs*, 12, 16-18.
- Wood, E, 2006 (b), *From bursar to school business manager: the development challenge*, in *Professional Development Today*. 9,3, 6-13.
- Wood, E, 2005, *Flexible Site-based Management: implications for the emerging profession of school business manager*, paper presented at the AERA research meeting, Montreal, (unpublished)
- Wood, E, O'Sullivan, F, Ngwana, T & Ellis, T, May 2004, *Baseline Study of School Bursarship*, (unpublished)
- Workhouse, L, 2006, *A Catering manager's nightmare? Rising to meet the challenge*, in *Just4SBMs*, 10, 16-17.

Websites

Department for Education and Skills, December 2006, Case Histories,
<http://www.teachernet.gov.uk/wholeschool/remodelling/bursars/casehistories/>

Department for Education and Skills, December 2006: **<http://www.dfes.gov.uk/valueformoney/>**

NCSL, December 2006, Case Study Videos, **<http://www.ncsl.org/programmes/bdp/videos.cfm>**

TDA, July 2007, Career Framework, **<http://www.tda.gov.uk/support/careerdevframework.aspx>**

Appendix 1: 2003 Questionnaire



School does not have a bursar ☐
Please fill in Part 1

If you returned the previous national survey please tick this box ☐

NATIONAL SURVEY OF SCHOOL BURSARSHIP

This questionnaire will gather evidence of the roles and responsibilities of bursars in schools for a major nationwide research project on bursarship. All data gathered will be held confidentially, and only used in aggregate form. Please read the questionnaire and tick the boxes or complete options that correspond to your own and your school's details.

Please return your completed questionnaire to: Elizabeth Wood, Director School Business Management Development, International Institute for Education Leadership, University of Lincoln, Brayford Pool, Lincoln, LN6 7TS.

Part 1: Your School

Type (tick as many as are relevant)				Location		Present Funding Regime			
Nursery	<input type="checkbox"/>	Secondary	<input type="checkbox"/>	London	<input type="checkbox"/>	LEA	<input type="checkbox"/>	Voluntary Aided	<input type="checkbox"/>
Infant	<input type="checkbox"/>	Sixth Form	<input type="checkbox"/>	Inner City	<input type="checkbox"/>	CTC	<input type="checkbox"/>	Voluntary Controlled	<input type="checkbox"/>
Primary	<input type="checkbox"/>	Special	<input type="checkbox"/>	(Sub)Urban	<input type="checkbox"/>	Independent	<input type="checkbox"/>	Community	<input type="checkbox"/>
Middle	<input type="checkbox"/>	Other	<input type="checkbox"/>	Rural	<input type="checkbox"/>	Foundation	<input type="checkbox"/>	Was your school GM?	Yes/No <input type="checkbox"/>

Income 2002-3:

Has OFSTED nominated your school: as having Serious Weaknesses ☐ Yes/No for Special Measures ☐ Yes/No

Has your school: Beacon status ☐ Yes/No Specialist status ☐ Yes/No Is your school applying for Specialist status: ☐ Yes/No

Headteacher	Pupils	Staff
Year Appointed <input type="text"/>	No of Pupils <input type="text"/>	No. of FTE Teaching Staff: <input type="text"/>
Salary <input type="text"/>	Pupil Age Range <input type="text"/>	No. of FTE Support Staff: <input type="text"/>

Part 2: You and Your Career

Current Job Title:		Peripatetic Bursars Only: No. of Schools	
Year of Appointment:	No. of Hours per Week	Year First Appointed as a Bursar	

Gender	Age	Salary Level £K									
Male	<input type="checkbox"/> < 25 <input type="checkbox"/> 36-45 <input type="checkbox"/> 56-65 <input type="checkbox"/>	<input type="checkbox"/> < 5	<input type="checkbox"/> 11-15	<input type="checkbox"/> 21-25	<input type="checkbox"/> 31-35	<input type="checkbox"/> 41-45	<input type="checkbox"/> >50				
Female	<input type="checkbox"/> 25-35 <input type="checkbox"/> 46-55 <input type="checkbox"/> > 65 <input type="checkbox"/>	<input type="checkbox"/> 5-10	<input type="checkbox"/> 16-20	<input type="checkbox"/> 26-30	<input type="checkbox"/> 36-40	<input type="checkbox"/> 46-50	<input type="checkbox"/>				

Most Recent Previous Post

Job Title:

Area of Work: (Please tick the most appropriate box or give details in other)

Health Service	<input type="checkbox"/>	Government	<input type="checkbox"/>	Industry	<input type="checkbox"/>	Retail	<input type="checkbox"/>	Charity	<input type="checkbox"/>	Finance	<input type="checkbox"/>
Self Employed	<input type="checkbox"/>	Education	<input type="checkbox"/>	Tourism	<input type="checkbox"/>	Forces	<input type="checkbox"/>	Church	<input type="checkbox"/>	Other	<input type="checkbox"/>

If other state details:

Profession and Qualifications

What is the highest academic qualification you hold?

(Please tick the most appropriate box or give details in other)

CSE/GCSE/RSA ☐ A Levels ☐ Foundation Degree ☐ Degree ☐ Masters ☐ Doctorate ☐
 BTEC/NVQ 2/3 ☐ ONC/D ☐ HNC/D ☐ BTEC/NVQ 4/5 ☐ Other ☐ Please state:

If you are currently enrolled on an academic programme please give details:

What professional qualifications/affiliations do you hold?

(Please tick any box that is relevant and/or give details in other)

Accounting/Finance ☐ Personnel ☐ Business & Admin ☐ Facilities ☐ ICT ☐ Health & Safety ☐
 Bursars Certificate ☐ LNBA ☐ Teaching ☐ Other ☐ Please state:

If you are currently studying for a professional qualification please give details:

Have you heard of the National Bursars Association (NBA)?

Yes/No

Are you a member of the NBA?

Yes/No

Have you heard of the Independent Schools' Bursars Association (ISBA)?

Yes/No

Are you a member of the ISBA?

Yes/No

Part 3: Your Responsibilities in the School

Please read the following descriptions of bursarship functions in schools. Tick the most appropriate box against each function for your job (**One box only**). Tick 'Perform Myself' if this is one of your key roles where you take the initiative. Tick 'Supervise Others' if this is in your remit but you also supervise others in the function. Tick 'Not my remit' if this is not in your responsibility.

Resource Management Function	Perform myself	Supervise others	Not my remit
1. Prepare and produce records and returns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Maintain pupil records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Analyse and report trends in pupils numbers, examination results and exclusions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Manage legal, public and statutory matters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Initiate and manage change and improvement in pursuit of the school's goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Manage the administrative, clerical and other support functions of the school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Participate in strategic planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Maintain positive relationships among all members of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Manage support staff to promote the school positively to all stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Manage marketing matters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Develop relationships with community and businesses to secure support for school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Create positive relationships among all members of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Develop supportive relationships with parents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Keep accurate financial accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Comply with sound principles of school finance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Maximise income through lettings and additional activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Manage the budget cycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Analyse costs to ensure value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Report accounting, auditing and financial information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Manage cash, investments and credit control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Evaluate and plan the budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Develop sound financial systems and practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Develop financial strategy and planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Manage school support contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Perform	Supervise	Not my

25. Keep accurate staff records			
26. Administer personnel remuneration			
27. Follow clear and fair principles of recruitment, retention and discipline			
28. Supervise and deploy support staff			
29. Manage staff contracts			
30. Manage supply staff cover			
31. Appoint and induct support staff			
32. Secure good labour relations through individual and collective negotiations			
33. Appraise and develop support staff			
34. Develop good labour relations			
35. Keep records of computer hardware and software			
36. Manage maintenance of the school's computer system			
37. Ensure compliance with legal requirements for ICT			
38. Manage information and communication systems			
39. Evaluate management information systems			
40. Develop management information systems			
41. Develop the school's computerised administration system			
42. Keep records of equipment, furnishings and school maintenance programmes			
43. Ensure the continuing availability of supplies, services and equipment			
44. Follow sound practices in real estate management and grounds maintenance			
45. Supervise planning and construction services			
46. Ensure the safe maintenance and operation of all buildings			
47. Ensure the maximum level of security consonant with the ethos of the school			
48. Establish and monitor a site security policy			
49. Ensure the adequate and safe operation of school transport			
50. Ensure the adequate and efficient provision of food services			
51. Keep accurate records of learning resources and equipment			
52. Maintain learning resources			
53. Articulate the curriculum philosophy of the school			
54. Teach pupils when required			
55. Ensure conformity with health and safety legislation			
56. Manage risk/fire control, safe systems of work and medical aid			
57. Ensure risk management processes are adhered to			
58. Manage disaster planning and recovery plans			
59. Develop disaster and recovery plans			
60. Promote & maintain close links with LEA colleagues			
61. Act as personal assistant to the headteacher			
62. Monitor economic and education trends that might impact on the school			
<i>Please add any of your responsibilities you feel we have omitted:</i>			
64.			
65.			

Please list the 5 most important tasks you undertake in your job:

1.
2.
3.
4.
5.

Part 4: Your Role in the School

Please read the following descriptions of different bursar's roles in schools. Allocate from 0 - 3 points to each box. 0 = does not describe my role, 1 = some elements of my role, 2 = many elements of my role, 3 = closely resembles my role.

Services the needs of teaching and management staff on request. Regarded as not having any relevant expertise in understanding the learning process. Valuable in providing information pertinent to educational decisions. Not a member of the SMT/LT.

Usually, but not invariably the leader of the support staff. Regarded as a subordinate to teaching staff but important in supporting teaching and learning. Advises SMT/LT or may be a member with limited input. Any change in status is incremental.

Leader of the support staff with some human resource management responsibilities for teaching staff. Manages out-sourced contracts. Fully functional and accepted part of the SMT/LT making a significant contribution to all school management processes through offering additional perspectives.

Responsibility for all human resource management. Responsibility for functions that affect the provision of a high quality learning environment. An integral part of the SMT/LT, with a post equivalent to, or higher than, that of a deputy head.

Relationship with Governing Body

No formal relationship with Governing Body

Advise Governing Body

Clerk to Governing Body

Member of Governing Body

Manage clerking of Governors meetings

Member of Governing Body Committees

Please state details of Committee membership:

.....

Membership of SMT/LT

Full member of SMT/LT

Member of strategic planning group (not SMT/LT)

Advise SMT/LT

Attend SMT/LT if required

Member of management group relevant to bursars' duties

Other

If other please state details:

.....

Part 6: Your Comments

If you have any comments you would like to make, please do so here:

Please would you include your job description and line management diagram with your completed form (if available). The information provided in these documents will contribute significantly to understanding the bursarship profession.

Thank you for completing this questionnaire and be assured that we will respect your confidentiality

Appendix 2: 2006 Questionnaire

If your school does not have a bursar please tick this box, write your job title below and fill in Part 1 only ☐
 Job title of the person carrying out the bursar's function: _____

National Survey of School Business Management (2006)

This questionnaire will gather evidence of the roles, responsibilities and training of bursars/school business managers in schools for a major nationwide research project on bursarship. All data gathered will be held confidentially, and only used in aggregate form. Please read the questionnaire and tick the boxes or circle/complete options that correspond to your own and your school's details.

Please return your completed questionnaire to: Elizabeth Wood, Principal Researcher, Germs Educational Limited, Penny Garth, Lissington Road, Wickenby, Lincolnshire, LN3 5AB.

PART 1: YOUR SCHOOL

Type

Nursery ☐ Infant ☐ Primary ☐ Middle/Primary ☐ Middle/Secondary ☐ Secondary ☐ Sixth Form ☐
 Cross Phase ☐ Special ☐ Boarding ☐ Other: _____ Pupil Age Range: _____

Is your school part of a: Cluster ☐ Yes / No Hard Federation ☐ Yes / No Soft Federation ☐ Yes / No

Is your school: an Extended School ☐ Yes / No a Training School ☐ Yes / No

Is your school considering becoming: Federated ☐ Yes / No an Extended School ☐ Yes / No

Peripatetic
Bursars Only
No. of Schools: _____

Location

Please state your Local Authority: _____

OFSTED/ISI

After your last inspection was your school categorised as (please tick the appropriate box):

Requiring Special Measures ☐ Needing to Improve ☐ Satisfactory ☐ Good ☐ High Performing ☐

Present Funding Regime

Independent ☐ Community ☐ Foundation ☐ Maintained ☐ Non-maintained ☐ Voluntary-aided ☐ Voluntary-controlled ☐
 Academy ☐ CTC ☐ Specialist ☐ Other (Please state): _____

Income (2005-6)

School Budget Share: [Independent schools: use this category]

< £100K ☐ £100-£250K ☐ £250-£500K ☐ £500-£750K ☐ £750K-£1M ☐ £1-1.5M ☐ £1.5-2M ☐
 £2-2.5M ☐ £2.5-3M ☐ £3-3.5M ☐ £3.5-4M ☐ £4-4.5M ☐ £4.5-5M ☐ >£5M ☐

Standards Fund/Grant:

< £25K ☐ £25-50K ☐ £50-75K ☐
 £75-100K ☐ £100-250K ☐ £250-500K ☐
 £500-750K ☐ £750K-1M ☐ >£1M ☐

Other Income/Funding:

< £25K ☐ £25-50K ☐ £50-75K ☐
 £75-100K ☐ £100-250K ☐ £250-500K ☐
 £500-750K ☐ £750K-1M ☐ >£1M ☐

Number of Pupils

>100 ☐ 101-200 ☐ 201-500 ☐ 501-1000 ☐ 1001-1500 ☐ 1501-2000 ☐ > 2000 ☐

Staffing

No of FTE Qualified Teaching Status Staff: _____

No of FTE Support Staff: _____

Headteacher:

Salary range:

Year Appointed: _____ £51-60K ☐ < £20K ☐ £21-30K ☐ £31-40K ☐ £41-50K ☐
 £61-70K ☐ £71-80K ☐ £81-90K ☐ > £90K ☐

PART 2: YOU & YOUR CAREER

Gender

Male ☐ Female ☐

Age

<35 ☐ 36-45 ☐ 46-55 ☐ 56-65 ☐ >65 ☐

Salary Level

<£10K ☐ £11-15K ☐ £16-20K ☐ £21-25K ☐ £26-30K ☐ £31-35K ☐ £36-40K ☐
 £41-45K ☐ £46-50K ☐ £51-55K ☐ £56-60K ☐ £61-65K ☐ £66-70K ☐ >£70K ☐

Your Career in School Business Management

Job Title:

Administrator ☐ Admin Officer ☐ Bursar ☐ Business Manager ☐ Finance Manager ☐ Finance Officer ☐ Secretary ☐

Office Manager ☐ Senior Admin Officer ☐ Other: _____

No. of Contracted Hours per Week: _____ No. of Years in Current Post: _____ No of Paid Weeks per Year: _____

Total Years a School Bursar: _____ Original Job Title when First Appointed as School Bursar: _____

Your Career Sector before School Business Management

Central Gov't ☐ Charity ☐ Church ☐ Education ☐ Finance ☐ Forces ☐ Health Service ☐
 Home Maker ☐ Industry ☐ Local Gov't ☐ Retail ☐ Self Employed ☐ Tourism ☐ Other ☐

If other state details: _____

Profession and QualificationsWhat **professional** qualifications/affiliations do you hold? (Please tick the most appropriate boxes or give details of other)

Administration <input type="checkbox"/>	Business <input type="checkbox"/>	Facilities <input type="checkbox"/>	Financial <input type="checkbox"/>	Health & Safety <input type="checkbox"/>	ICT <input type="checkbox"/>	Marketing <input type="checkbox"/>
Personnel <input type="checkbox"/>	Secretarial <input type="checkbox"/>	Teaching <input type="checkbox"/>	CSBM <input type="checkbox"/>	DSBM <input type="checkbox"/>	LNBA <input type="checkbox"/>	Other <input type="checkbox"/>

If other state details: _____

If you are currently studying for a professional qualification please give details: _____

What is the highest **academic** qualification you hold? (Please tick the most appropriate box or give details of other)

G(C)SE/RSA <input type="checkbox"/>	A Levels <input type="checkbox"/>	Foundation <input type="checkbox"/>	Degree <input type="checkbox"/>	Masters <input type="checkbox"/>	Doctorate <input type="checkbox"/>	ONC/D <input type="checkbox"/>
HNC/D <input type="checkbox"/>	BTEC/NVQ 2/3 <input type="checkbox"/>	BTEC/NVQ 4/5 <input type="checkbox"/>	Other <input type="checkbox"/>	Please state: _____		

If you are currently enrolled on an academic programme please give details: _____

What training/professional development opportunity would you like to be available: _____

Is your training linked to the school development plan?

Yes / No

Do you access local authority training?

Yes / No

Have you heard of the National College for School Leadership (NCSL)?

Yes / No

Professional Associations :

Have you heard of:

The National Bursars Association (NBA)?

Yes / No

Are you a member of the NBA?

Yes / No

The Association of School & College Leaders (ASCL)?

Yes / No

Are you a member of the ASCL?

Yes / No

The Independent Schools' Bursars Association (ISBA)?

Yes / No

Are you a member of the ISBA?

Yes / No

The Association of School Business Officials (ASBO)?

Yes / No

Are you a member of the ASBO?

Yes / No

Are you a consultant bursar?

Yes / No

If yes, please describe what you do _____

Please describe anything you are doing to raise the status of bursarship: _____

PART 3: YOUR RELATIONSHIPS**Relationship with Governing Body (GB)** (please tick the most appropriate box)

Advise <input type="checkbox"/>	No formal relationship with Governing Body <input type="checkbox"/>	Clerk to Governing Body <input type="checkbox"/>
Full member <input type="checkbox"/>	Member of Governing Body Committee/s <input type="checkbox"/>	Manage Clerking of Governors Meetings <input type="checkbox"/>

Please list any Governing Body

Committees of which you are a member: _____

Relationship with Senior Management Team/Leadership Team (SMT) (please tick the most appropriate box)

Full member of SMT <input type="checkbox"/>	Advise SMT <input type="checkbox"/>	Attend SMT if required <input type="checkbox"/>	No formal relationship with SMT <input type="checkbox"/>
---	-------------------------------------	---	--

Member of management group/s relevant to bursars' role

☐ Name of group/s _____

Member of strategic planning group/s (not SMT)

☐ Name of group/s _____**Relationship with OFSTED/ISI**If you have not been in post for an inspection please tick the box and move on to the next question ☐

Please rate your involvement with your school's last inspection: 1 = not involved, 4 = very involved

Before ☐ During ☐ After ☐ Were you interviewed during the inspection process? Yes / No ☐**Relationship with Key School Stakeholders:**

Contact: Please rank how often you are in contact with the following school stakeholders: (1 = never, 4 = daily)

Agencies <input type="checkbox"/>	Businesses <input type="checkbox"/>	Community <input type="checkbox"/>	Governors <input type="checkbox"/>	Headteacher <input type="checkbox"/>	Local Authority <input type="checkbox"/>	SMT <input type="checkbox"/>
Other Bursars <input type="checkbox"/>	Parents <input type="checkbox"/>	Pupils <input type="checkbox"/>	Snr Support Staff <input type="checkbox"/>	Senior Teachers <input type="checkbox"/>	Support Staff <input type="checkbox"/>	Teachers <input type="checkbox"/>

Importance to the role: Please rank, in your opinion, the importance of working with the following school stakeholders: (1 = not, 4 = very)

Agencies <input type="checkbox"/>	Businesses <input type="checkbox"/>	Community <input type="checkbox"/>	Governors <input type="checkbox"/>	Headteacher <input type="checkbox"/>	Local Authority <input type="checkbox"/>	SMT <input type="checkbox"/>
Other Bursars <input type="checkbox"/>	Parents <input type="checkbox"/>	Pupils <input type="checkbox"/>	Snr Support Staff <input type="checkbox"/>	Senior Teachers <input type="checkbox"/>	Support Staff <input type="checkbox"/>	Teachers <input type="checkbox"/>

Part 4: YOUR ROLE AND RESPONSIBILITIES IN THE SCHOOL

Please list the 3 most important elements of your role:

1 _____

2 _____

3 _____

Please state which government/school initiative is currently having most impact on your role:

Please read the following descriptions of school business management responsibilities. Consider each responsibility and tick the most appropriate box for your job **(one box only for each question)**.

Tick 'Perform Myself' if this is one of your key roles where you take the initiative and carry out the function yourself.

Tick 'Supervise Others' if this is one of your roles and you supervise others even if you sometimes perform elements of the function yourself.

Tick 'Not my remit' if this is not your responsibility.

Resource Management Responsibility		Perform Myself	Supervise Others	Not My Remit	
1	Prepare and produce records and returns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1
2	Maintain pupil records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2
3	Analyse and report trends in pupil numbers and/or examination results and exclusions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
4	Manage legal, public and statutory matters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4
5	Initiate change in pursuit of the school's goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5
6	Manage the administrative, clerical and/or other support functions of the school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6
7	Manage improvement initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7
8	Provide a reception service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8
9	Act as personal assistant to the headteacher	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9
10	Manage information and communication systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10
11	Evaluate and develop management information systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11
12	Provide information for the school development plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12
13	Provide information for school middle managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13
14	Monitor economic and/or education trends that might impact on the school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14
15	Participate in strategic planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15
16	Maintain positive relationships among all members of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16
17	Manage support staff to promote the school positively to all stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	17
18	Promote positive relationships with appropriate agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	18
19	Maintain close links with agencies and/or local authority colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	19
20	Develop relationships with community and businesses to secure support for school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20
21	Create positive relationships among all members of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21
22	Develop supportive relationships with parents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	22
23	Manage marketing matters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23
24	Support development of promotional materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	24
25	Keep accurate financial accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	25
26	Raise orders and/or process invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	26
27	Comply with sound principles of school finance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	27
28	Maximise income through lettings and/or additional activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28
29	Manage the budget cycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29
30	Analyse costs to ensure value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30
31	Report accounting and/or auditing and financial information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31
32	Manage cash and/or investments and credit control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	32
33	Evaluate and plan the budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33
34	Develop sound financial systems and practice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	34
35	Develop financial strategy and planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	35
36	Keep accurate staff records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	36
37	Administer personnel remuneration (including payroll)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	37
38	Follow clear and fair principles of recruitment and/or retention and discipline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	38
39	Supervise support staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	39
40	Manage staff contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	40
41	Deploy support staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	41

	Perform Myself	Supervise Others	Not My Remit	
Resource Management Responsibility				
42 Manage supply staff cover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	42
43 Appoint support staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	43
44 Induct support staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	44
45 Appraise and develop support staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	45
46 Secure good labour relations through individual and/or collective negotiations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	46
47 Develop good labour relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	47
48 Keep records of computer hardware and/or software	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	48
49 Manage maintenance of the school's computer system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	49
50 Ensure compliance with legal requirements for ICT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	50
51 Develop the school's computerised administration system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	51
52 Keep records of equipment and/or furnishings and school maintenance programmes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	52
53 Ensure the continuing availability of supplies and/or services and equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	53
54 Follow sound practices in real estate management and/or grounds maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	54
55 Monitor and reduce the environmental impact of the school's energy consumption	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	55
56 Manage planning and/or construction projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	56
57 Ensure the safe maintenance and/or operation of all buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	57
58 Ensure the adequate and safe operation of school transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	58
59 Ensure the adequate and efficient provision of food services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	59
60 Manage school support contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	60
61 Ensure medical aid is available in the school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	61
62 Establish and monitor a site security policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	62
63 Ensure conformity with health and safety legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	63
64 Monitor and manage fire control systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	64
65 Manage safe systems of work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	65
66 Ensure the maximum level of security consonant with the ethos of the school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	66
67 Ensure risk management processes are adhered to	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	67
68 Manage disaster planning and/or recovery plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	68
69 Develop disaster and/or recovery plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	69
70 Keep accurate records of learning resources and/or equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	70
71 Maintain learning resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	71
72 Articulate the curriculum philosophy of the school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	72
73 Teach pupils when required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	73
74 Class/year tutor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	74
<i>Please add any of your responsibilities you feel we have omitted:</i>				
75 _____				75
76 _____				76

Part 5: Your Comments

If you have any comments you would like to make about any aspect of your career, training, relationships, role or this questionnaire, please do so here:

Please would you include your job description and line management diagram with your completed form (if available). The information provided in these documents will contribute significantly to understanding the bursarship profession.
Thank you for completing this questionnaire and be assured that we will respect your confidentiality

**National College for
School Leadership**
Triumph Road
Nottingham NG8 1DH

T: 0845 609 0009
F: 0115 872 2001
E: enquiries@ncsl.org.uk
W: www.ncsl.org.uk