

4. Understanding the role, responsibilities and relationships

The job is basically the same in all schools, it comes down to size as to whether it's done by a "jack of all trades" or run with a team of specialists looking after say a huge 6th form college.

(Online focus group discussion, 2007)

Introduction

- 4.1.** Section 3 described the school business manager's role, responsibilities and interaction with stakeholders by taking a holistic overview. It has been clear since these resource managers were first researched, however, that there are many different approaches to successfully addressing the role (O'Sullivan, Thody and Wood, 2000). This view is supported by more recent research, in the United States, into chief operating officers, who work as the second in command to company chief executive officers, where Bennett and Miles suggest that 'the role is structurally, strategically, socially, and politically unique – and extraordinarily situational' (2006:72). Section 4 considers these context bound roles and describes the four principal approaches operating in schools in 2007. A debate about the title provides further insights into these approaches.

Responding to individual schools' needs

- 4.2.** In the previous section, there was a discussion of levels of operation that suggested administration activity has reduced since 2000 whilst management and leadership activity had increased (Section 3, Table 3.5). This aggregation of responses may provide an overall indication of bursars' levels of operation, but does not indicate how different school business managers operate in their own schools. The data from the resource management section of the questionnaire were, therefore, analysed to ascertain levels of operation for each individual. There are nine variations of administration, management and leadership and each has been assigned a name that pictorially represents these variables (Table 4.1). Hence, a diamond operates mainly at management level with reduced administration and leadership level activities.










Levels of Operation	Name	Pictorial Representation
A equal to M equal to L	Brick	
A equal to M but less than L	Funnel	
A equal M but more than L	House	
A less than M and less than L	Inverted triangle	
A less than M which is more than L	Diamond	
A less than M equal L	Pants	
A more than M which is more than L	Triangle	
A more than M which is less than L	Hourglass	
A more than M equal L	Chimney	

Table 4.1 Proportion of administration, management and leadership for SBM's

4.3. Although trends in the level of activity across responsibility areas have varied between 2000 and 2007 (Section 3, Table 3.1) there are clear trends in operational approaches (Table 4.2). There is a significant decrease in the numbers operating at principally administration level (triangle) and an increase in combined administration and leadership activity (hourglass). The percentage working principally at management or administration and management level (diamond or house) has also decreased whilst leadership activity has increased, particularly for the principal leadership-level, inverted triangle.

Indicator of Operational Approach	2000	2004	2007
Brick	3%	5%	7%
Inverted triangle	2%	3%	10%
Funnel	2%	2%	4%
Pants	11%	15%	16%
Diamond	20%	17%	8%
House	7%	8%	2%
Chimney	20%	2%	20%
Triangle	24%	20%	4%
Hourglass	11%	4%	29%
Significant per cents increase 2004 – 2007	Significant per cent decrease 2004 – 2007		

Table 4.2: Styles of operation 2000 – 2007

- 4.4.** As professional programmes designed specifically for school business managers could be impacting levels of operation, comparisons were made between business managers qualified with the CSBM, DSBM, both or the LNBA and how they were operating (Table 4.3). Returns suggest that CSBM or DSBM holders work predominantly at leadership and administration levels (possibly an indication that many are employed in primary schools). Those business managers holding either both the CSBM and DSBM or the LNBA demonstrated an increase in management activity and were working at all levels of operation.

Shapes	CSBM	C/DSBM	DSBM	LNBA
Administration	42%	28%	35%	20%
Management	18%	36%	15%	40%
Leadership	40%	36%	50%	40%
Grand total	100%	100%	100%	100%

Table 4.3: Levels of operation compared with SBM qualifications 2007

- 4.5.** These representations of operational approaches not only provide an indication of the levels at which individual school business managers work, but also provide an insight into gender characteristics and trends since 2000. Between 2000 and 2004 there was little change in how business managers operated, whereas between 2004 and 2007 there have been significant changes. The variable new to this time frame has been the introduction of NCSL CSBM and DSBM. The data suggest that these programmes have been successful in increasing awareness of leadership activity and promoting closer collaboration with the SMT and headteacher (the CSBM) whilst the DSBM has consolidated leadership activity and increased management activity for both management systems (eg devising a business continuity plan) and human resources (eg presenting a staff development strategy).

Portraits of school business managers

- 4.6.** These operational trends have resulted in the emergence of four approaches to school business management emerging. Each is distinguishable in their style of operation in the school. The only common factor that all reported was that they were all responding to the 'Extended Schools' initiative and FMSiS.

Profile 1: Finance, administration officer, manager or bursar

- 4.7.** School business managers working in smaller primary and secondary schools are likely to be the 'hourglass' shape and this is currently the approach which occurs most often (Figure 4.1). In primary schools, they are probably the only member of office support staff. At secondary level and in some primary schools, they will be responsible for a limited support staff team. They will be directly responsible for all administration and clerical activity, as well as working with the headteacher and chair of governors at a strategic level. The CSBM and DSBM were designed to help such school business managers develop their understanding of the wider education environment and increase their management activities in school.
- 4.8.** Although this role, which incorporates a flip-flop between administration and leadership is currently the principal approach in schools, possibly because of the large number of smaller schools in which they are found, many of these business managers are succeeding in widening their management activity by overseeing projects, organising contracts and widening their risk management expertise. As a result, we would expect this approach to feature less widely in 2010, by which time they will have balanced their administration, management and leadership activities. Further examination of these business managers, along with those who feature in Figure 4.2, would be key in assessing the impact of NCSL programmes.

- 46–55 year old females.
- They have six years experience and have been in post less than five years in primary and secondary phase schools.
- Employed full time and are paid between £21,000 and £25,000.
- Schools have between 200 and 500 pupils and are part of clusters.
- They were originally finance or admin officers or secretaries in education or the finance sector.
- They either have school level qualifications or a degree or its equivalent.
- They have the CSBM and/or finance administration, secretarial or business qualifications.
- They are studying for the CSBM/DSBM or a finance qualification.
- They access LA Training and half have their training linked to the SDP.

- Their primary role is budgeting, followed by wider finance management responsibilities, personnel, facilities and management information.
- They are working on FMSiS and Extended Schools.
- School initiatives are at management level, eg overseeing a project, risk management and emergency planning, organising contracts.
- They advise the governing body and are members of the governing body committees.
- They are full members of the SMT.

Figure 4.1: Profile 1: finance/admin officer/manager or bursar characteristics 2007

4.9. Figure 4.1 describes the characteristics of this finance/administration officer/manager or bursar role. Most are females aged between 46 and 55 and are found in small primary and secondary schools. They are employed full-time and earn between £21,000 and £25,000. Many of these business managers were secretaries or finance or administration officers and they hold either school-level qualifications or a degree. There is still confusion about the title that best describes their role. When these business managers describe their activities they use terms that reflect the paradoxical nature of the role, eg 'control' and 'flexibility', 'maintain' and 'create', 'monitor' and 'develop'. Attributes they value are reliability, integrity and patience.

Profile 2: Finance, administration officers or bursars

4.10. The main administration approach is the 'chimney'. This appears to be a role that is consolidating in primary schools with fewer than 500 pupils. These 35-55 year old females have the least amount of professional experience, the lowest qualifications and the worst employment terms. Only half are employed full time and they earn between £16,000 and £20,000 per annum. They concentrate on administration activities because they have limited or no clerical support. Nevertheless, they have begun to widen their management and leadership activities, principally to budgeting and project management. These business managers are divided into those who work with the SMT and governing body and those who have no formal contact with either. They use administrative terms such as 'efficiency', 'ensure', 'input' and 'keep' to describe their role although they also use facilitative terms such as 'assist', 'liaise' and 'report', and management terms: 'oversee', 'monitor' and 'plan'. The attributes of 'flexibility', 'multi-tasking' and 'patience' that they value are indicators of the crowdedness of their role. This group is also benefiting from the NCSL programmes.

- 35-55 year old females.
- They have less than five years experience and have been in post less than five years in primary phase schools.
- Half are employed full-time. They are paid between £16,000 and £20,000 per annum.
- Schools have fewer than 500 pupils.
- They were originally an administrator or bursar in education, the finance sector or industry, or were home-makers.
- They either have school or FE qualifications.
- They have either the CSBM or secretarial, finance, administration, or business qualifications.
- They are studying for the C/DSBM or a finance qualification.
- They access local authority training and half have their training linked to the SDP.
- Their primary role is almost exclusively budgeting and finance followed by wider finance management responsibilities, HR, facilities and administration.
- They are working on FMSiS and extended schools.
- School initiatives are either project management or budget setting.
- They advise the governing body or have no formal relationship.
- They are either full members of the SMT or have no formal relationship.

Figure 4.2: Profile 2: finance/admin officers or bursar characteristics 2007

Profile 3: School business managers

- 4.11.** The principal management/leadership approach, the ‘pants’ school business manager, appears to be consolidated in medium to large secondary schools. Most are females but a significant number are male. They feature the widest age range of between 36 and 55 years old and have been in post an average of 4 years. Although these business managers are paid between £31,000 and £40,000 per annum and are highly qualified and experienced they are not all paid full-time nor for the full year (Figure 4.3). School business managers were the only group who declared that they were addressing workforce reform issues as well as FMSiS and extended schools. They take part in leadership activities, manage information systems and manage school projects. Although this group use mainly management terms to describe their activities, eg ‘monitor’, ‘review’, ‘plan’ or ‘report’, they also use power terms such as ‘control’, ‘ensure’, ‘comply’ or ‘impose’.

- 36–55 year old females, one third males who have five years experience and have been in post four years in secondary phase schools.
- Three quarters are employed full-time and 85 per cent are paid for the full year and are paid between £31,000 and £40,000 per annum.
- Schools have between 500 and 1,500 pupils.
- They were originally bursars, business managers or directors in the finance sector, local government, industry or education.
- They either hold university or further education level qualifications.
- They have the CSBM, finance, administration or business qualifications.
- They are studying for the C/DSBM.
- Most access local authority training and two thirds have their training linked to the SDP.
- Their primary role is budgeting and finance management, followed by facilities and personnel.
- They are working on FMSiS extended schools and workforce reform.
- School initiatives are either project management based, or management information related.
- They advise governors or are members of governing body committees.
- They are full members of the SMT.

Figure 4.3: Profile 3: School business managers characteristics 2007

Profile 4: Directors and heads of resources

- 4.12.** The two main approaches which focus on leadership are ‘inverted triangles’ and ‘funnels’. Both are increasing in occurrence (Table 4.2). These directors or heads of resources are usually found in secondary phase schools of between 500 and 1000 pupils (Figure 4.4). They lead large support teams that include middle managers, are full members of the SMT and advise, or clerk, for the governing body. They are either male or female, with an average of eight years experience earning between £36,000 and £40,000 per annum. They are usually highly qualified and have held senior positions in their previous posts. These business managers use predominantly facilitative terms to describe their activities, eg ‘support’, ‘build’, ‘allow’, ‘improve’, ‘create’. Attributes they value highly are integrity and a professional approach.

- 46–55 year old females or males who have eight years experience and have been in post almost 5 years in secondary phase schools.
- Three quarters are employed full time and are paid between £36,000 and £40,000 per annum.
- Schools have between 500 and 1,500 pupils.
- They were originally finance officers/managers or bursars in the finance sector, education or local government.
- They either hold university or further education level qualifications.
- They have business, finance or administration qualifications.
- They are studying for the DSBM.
- Most access local authority training and two thirds have their training linked to the SDP.
- Their primary role is leading budgeting and finance management, followed by facilities, HR wider responsibilities and strategy.
- They are working on FMSiS and extended schools.
- School initiatives are HR focused and developmental.
- They advise governors or clerk governing body meetings.
- They are full members of the SMT.

Figure 4.4: Profile 4: directors/heads of resources characteristics 2007

- 4.13.** Of the remaining approaches, the ‘triangle’ and ‘house’ have a similar role to the finance/admin officers described in Figure 4.2 but they are reducing in numbers (Table 4.2). The ‘triangle’ approach has evolved into the wider leadership and management role described in Figure 4.1, whereas the ‘house’ features increased management activities by developing systems to analyse benchmarking records and share them with the leadership team. The ‘diamond’ support services manager focuses on these management information activities and normally supervises support staff. This type works in schools of between 500 and 1,500 pupils and carries out few administration or leadership activities.
- 4.14.** The final type balances all levels of operation, looks like an upended brick and is found predominantly in secondary schools of 500 to 1,000 pupils but also occurs in all school phases and sizes. This ‘brick’ is an emerging role and is likely to be the type of business manager who can respond to school requirements at any level and might be the role to which SBMs should aspire.

- 4.15.** The implication of these findings is that there needs to be greater understanding of how the relationship between administration, management and leadership contributes to the effective school. Schools are constantly changing in response to government initiatives and their environment. These conditions require sophistication on the part of the school in evaluating and responding to its stage of development.
- 4.16.** Figure 4.5 represents school development stages in the form of a sigmoid curve (Handy, 1994). Schools in the bottom of the curve are failing or seriously weak and require an emphasis on administration and management to ensure that data are processed, interpreted and evaluated. Those at point 'A' are good schools that have reached a stage where they need to develop new initiatives in order to improve further. They require adaptable management systems and support staff leadership that interpret developments in a meaningful way and plan improvements accordingly, whereas those low performing schools at the bottom of the curve would need a focus on administration before the data was available to provide management information.

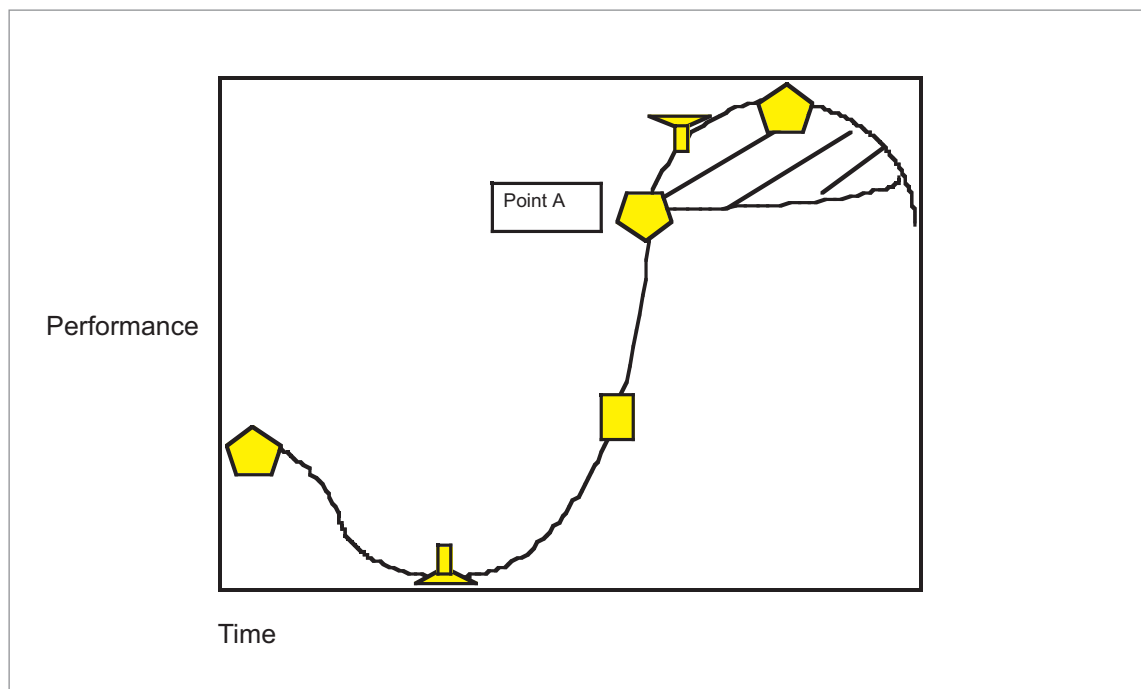


Figure 4.5: School Business management approaches in relation to the school's organisational development

The debate about the title

I attended a course the other day with thirty-five other school support staff doing basically the same job. Their titles ranged from Principle Finance Officer, School Business Manager, School Manager, Office Manger, Finance Manager and just one had the title of Bursar. My school has a Director of Corporate Services.

(Online focus group discussion, 2007)

- 4.17.** A characteristic of this emerging profession is the wide range of titles used to describe the role. The original questionnaire in 1999 returned over 100 different names. In 2007, there is some evidence of a reduction in titles with 78 being returned. For school business managers, most of these titles suggest their level of operation and responsibility focus, eg finance assistant or office manager. They may also be indicators of the approach the school is taking to supporting learning and teaching, eg the use of terms such as director and business (entrepreneurial) or principal and support services (learning focused).
- 4.18.** Preferred titles are emerging but many still hold multiple titles that indicate the range of the role and/or level of operation. Table 4.4 indicates that whilst 'bursar' is still the preferred title, 'school (business) manager' is becoming more popular and is probably replacing titles that indicated expertise in specific responsibility areas such as finance manager or administration officer. Administration titles and headteachers claiming to cover business management responsibilities are disappearing.

Title	2004 per cent	2007 per cent
Bursar	32	37
School business manager	18	32
Finance officer	9	5
Finance manager	7	3
Administrator	7	4
Administrator officer	7	4
Headteacher	5	1
Secretary	4	4
Senior admin officer	4	1
Office manager	3	4
Director	2	3
Administraton assistant	2	0
School manager	0	2
Decrease in occurance	Increase in occurance	

Table 4.4: Preferred Titles 2004 and 2007

- 4.19.** The full range of titles found in schools is an indicator of both the breadth of the role and confusion over what the role might encompass. Some discuss their preferred title with their headteachers and governors but find that their agreed title is then blocked by the local authority (Figure 4.6). Other local authorities advise on job titles but are inconsistent, thus adding to the confusion.

I am hearing more and more, my own LA included, about almost deliberate attempts to block the high status which Heads and Governors wish to place on their SBMs with the salary to match. We are hearing of some SBMs being addressed as Assistant Heads and I have been in touch with two of these. However, it appears to be the Head and Governors which are using this title but it is not officially recognised by the LAs.

Over the last 7 years I have progressed from Administrative Assistant to Bursar – following my completion of the CSBM, my headteacher and Governors fought with the LA to have my job re-graded to senior officer level and given the title of Bursar – which the LA thought was just a secondary role.

In our LA titles currently used are either "Bursar" or "Office Manager", but these seem to change every couple of years.

(Online focus group discussion, 2007)

Figure 4.6: Negotiating preferred titles 2007

- 4.20.** This inconsistency is a feature of the role that is compounded by senior teacher-leaders using titles in an apparently arbitrary manner (Figure 4.7). Some are philosophical about this abuse of their title, but understand that the use of appropriate titles will increase recognition of the role. There is a view that the title is extremely important and coming to an agreement will refocus energies on improving effectiveness.

Anyway my position in the school is quite high but not to the level of SMT unfortunately and my title gets changed every time the HT or DHT speaks about me. I range from administrator to business manager but more often than not it's the school secretary.

My title ranges from general dogsbody, clerk, secretary, administrative officer, depending on who is visiting the school.

I don't mind what I am called, but for recognition of position a suitable title helps.

What is in a title? Absolutely everything. We will never achieve proper recognition if we do not decide this for ourselves, and insist on its use...I for one would be fine with Bursar, Business Manager or Head of Resources. Lets just get business like and make a decision so that we can get on and bag the money (isn't that one of our strong points) and the recognition.

(Online focus group discussion, 2007)

Figure 4.7: Interchangeable use of titles 2007

Secretary

- 4.21.** Although there are school secretaries who carry out the original secretarial role, many have progressed to the wider business management remit. This new style of secretary will usually be found in primary schools earning up to £25,000 per annum. Most feel undervalued and regard the term 'secretary' as inappropriate to the responsibilities into which they have evolved.

My title is 'school secretary' and it has been for the eight years that I have been working in school, despite my role having changed and developed beyond all recognition.

On my payslip it says School Assistant and everyone in school calls me the school secretary. I hate it. When I have completed the CSBM I am supposed to be moving onto the Senior Management grade, but I am sure that everyone will continue to call me the secretary. Never mind, at least I get respect from most of the teachers, that is more than can be said for a lot of Bursars/Office Managers/Secretaries out there. The question is, should it bother me, or should I be satisfied that I know how the Head regards me and just get on with it?

(Online focus group discussion, 2007)

- 4.22.** These secretaries are widely appreciated by their headteachers and teaching staff, particularly for the pastoral role that they adopt. This usefulness in their current role, however, is preventing senior school leaders from considering how it might evolve to meet the school's changing circumstances.

Leadership titles

- 4.23.** At the opposite end of the leadership spectrum, are those who hold titles including the terms 'director', 'principal', 'leader' or 'head'. Many are linked to specific responsibility areas such as 'finance' or 'administration', but others are generic, referring to 'resources', 'support services' or 'business'. These are high status roles attracting salaries between £26,000 and £70,000 per annum with most earning between £31,000 and £45,000.

My title is Director of Support in a 1100 pupil secondary in ()shire. I don't really know why the Head decided on that title but I like it as it confers some status and I think very neatly sums up the job which is to oversee all the school's support functions which exist to support teaching and learning. As well as a strategic overview of finance and ICT I work closely with the Head on human resource issues and I'm responsible for pupil assessment data and writing the school timetable.*

(Online focus group discussion, 2007)

Bursar or school business manager

- 4.24.** The percentage holding either ‘bursar’ or ‘school business manager’ titles has increased from 50 per cent to 69 per cent between 2004 and 2007. There are also indications that ‘school business manager’ will soon become the preferred title. As a consequence, a debate is taking place about the merits of the two titles. Independent schools traditionally use the term ‘bursar’ whilst state schools and NCSL prefer ‘school business manager’. The document: ‘Looking for A Bursar’ (DfES, 2006) has now been subtitled ‘The Key to Effective School Business Management’ in order to reference both of these popular titles.

Bursar

- 4.25.** There has been a centuries’ long tradition of bursars in religious and educational institutions. The term ‘bursar’ derives from the Latin for ‘bag’ or ‘purse’, suggesting a financial role of ‘keeper of the purse’. Bursarship, however, was a position second only in status to the abbot/headteacher and central to the administration and management of the institution. In most independent schools, this high status is still usually the case. Within their own responsibility areas, bursars have a high degree of autonomy that can frustrate the headteacher.

At Westminster, the Headmaster was the chief executive and the Bursar was the finance director, with responsibility for financial management and for the non-academic functions such as catering and building maintenance. It looked like a clear division of responsibility, but in practice, it was nothing of the sort. The Bursar reported to the governing body; how far he came under the Headmaster's authority was never made clear. I could complain to the bursar about the revolting chicken but I could not insist that he sacked the chef or spent more money on school food.

(Rae 1993:388)

- 4.26.** For those who are confident in their role and who are already working in a high status position, particularly in secondary schools, the term ‘bursar’ is viewed as a ‘badge of honour’ that signifies an executive post and is consequently the preferred title. Returns of the current school business management survey demonstrate that, in 85 per cent of independent schools, ‘bursar’ is the preferred job title despite differing levels of operation and salary differentials of £45,000 to 50,000. In state schools, bursar salaries range from £10,000 to £65,000, with modal salaries of £21,000 to £30,000. The term ‘bursar’ has a long tradition that lends gravitas and authority to the profession. It is also the term used by the professional bodies (National Bursars Association, Independent Schools Bursars Association) and is a useful generic title such as ‘doctor’, ‘teacher’ or ‘nurse’ that readily identifies the profession but does not necessarily signify a level of operation.

School business manager

A full member of the school leadership team. Alongside the Principal, Assistant Principals, and Dean s/he is active in strategic development and establishing procedures ensuring they are communicated and realised in the school. Her/his greater understanding of the education process facilitates the building of flexible, interactive systems and support learning teams. As a leader of 'associate staff' (Mortimore et al 1995), s/he ensures that administration, finance and premises management are efficiently and effectively carried out by staff who feel valued and able to interact with and support teaching staff. Through an understanding of their own role, the school's values and the needs of educators to facilitate learning, the school business manager ensures the school is a living and adaptive learning environment, which anticipates and responds to change.

(O'Sullivan, Thody & Wood, 2000:197)

- 4.27.** School business manager is emerging as a preferred title particularly as it clearly states the role and level of operation. It is rapidly replacing the title of 'bursar' which, for many in the state sector, is associated with a finance management focus inconsistent with the responsibilities of the broad role. School business managers are more commonly found in secondary schools and it is a title widely aspired to at primary level where it is regarded as high status. Returns of the current school business management survey reveal that those holding this title attract the widest salary differential of £70,000, with most earning between £26,000 and £40,000.

- 4.28.** In 2000, when the title of 'school business manager' was suggested, alongside 'administration manager', 'support services manager' and 'education resource manager', it seemed to clearly describe the role (O'Sullivan, Thody and Wood, 2000). Many aspiring to, or holding, the title agree that it is still the most apt definition.

I do think that the title is important - mine is School Business Manager - and I deeply resent being referred to as the school secretary as this conjures up images of the person in the office who counts the dinner money, mends grazed knees and not much else. The title SBM does actually describe my role - that of managing the business function of the school, and it is important to me that my professional role is taken seriously both inside and outside the school.

(Online focus group discussion, 2007)

- 4.29. School:** When the impact of Every Child Matters (DfES, 2004) is considered, however, with the requirement for schools to operate within a wider community of state provision of services, it seems that schools will no longer be the discrete organisations that they used to be. Local Education Authorities have already dropped the 'E' and many are now led by a director with a social services background. Schools are also moving towards an extended role; promoting awareness of citizenship, environmental issues and healthy eating as well as extending the hours they are open and providing services to all age groups.

The use of the term 'school' in the title may either become redundant or differentiate business managers in the wider public service provision. For some it is already considered superfluous:

*I am currently a School Business Manager in a large primary school...I actually DON'T LIKE the title SBM. When signing letter when does the Head have 'School Headteacher' under their name? The word school doesn't need to be there as we are all in educational establishments. I sign my letters Business Manager.
(Online focus group discussion, 2007)*

- 4.30. Business.** The term 'business' is controversial with all but entrepreneurial teachers and so working in a school with a title that might create an immediate barrier may need to be carefully managed. Nevertheless there is a view that including the term 'business' promotes discussion about how schools are run.

I believe SBM says what it is: a person who manages the business side of school, if people feel uncomfortable with the business word then that's all to the good as they need to be taken out of the comfort zone of thinking that the school is not a business.

The school's business is learning, so as long as this is always made clear and understanding of this is modelled by a school business manager, then the term might be more acceptable to teachers. The term 'business' also reinforces the breadth of responsibility implicit in the role.

(Online focus group discussion, 2007)

- 4.31. Manager.** Managers are defined by Glover and Hughes as 'those who plan, organise and supervise work' (1996:4). Adopting this descriptor might exclude administrators or leaders from the profession. More importantly, the term implies that every school business manager can demonstrate that they operate at management level, raising the expectations of their employers. As this is still an evolving profession with no minimum entry requirement, if these expectations are not met, then the title could become devalued. Nevertheless there is evidence that the profession is looking for a title that adequately reflects the role and headteachers are closely monitoring the role and agreeing the title based on level of activity.

We are all trying to find a title that lives up to the operational level that a lot of us are working at.

I find a title tends to follow ability in a good school. In our school when our business manager moved up the pecking order nobody batted an eyelid as we could all see how good she was day in day out, she earned her title by doing the job and being good not by getting a qualification.

(Online focus group discussion, 2007)

Bursar	School business manager
Traditional title	New title
Suggests a finance role	Suggests wide responsibilities
Is generic and does not imply a specific level of operation	Suggests a specific level of operation
The title is not specific to schools	The title is specific to schools
Found principally in secondary and independent schools	Found principally in secondary schools
Preferred title in primary, middle and special schools	Preferred title in secondary schools
Usually viewed as a high status title by those secure in the role	Usually viewed as a high status title by those evolving into the role

Table 4.5: Comparison of bursar and schools business manager

4.32. The debate is still taking place as to whether ‘bursar’ or ‘school business manager’ is the title that most accurately reflects the role. Table 4.5 compares these titles and the arguments put forward to support them. Bursar is a traditional title that suggests a finance role and no preconceived level of operation that is viewed as high status by independent and expert business managers. Alternatively, school business manager is a new title that suggests a wider role and management level of operation. It is perceived as high status by those evolving into the role and working in primary schools.

Level 1	Clerical Assistant
Level 2	Finance/administration/support services assistant
Level 3	Finance/administration/support services officer
Level 4	Office manager/support services manager
Level 5	School business manager
Level 6	Business director / director of support services
Level 7	Head of business and resources
Level 8	Director of finance and resources

Table 4.6: Possible hierarchy of resource management roles

- 4.33.** Although ‘bursar’ and ‘school business manager’ are the preferred titles, a hierarchy of titles is likely to emerge that will represent the range of responsibility areas as well as indicating operation at administration, management and leadership levels. Table 4.6 is based on analysis of the 2007 survey results, the online focus group discussion and adverts placed in the education press for school business management experts. It proposes titles at introductory levels that suggest a speciality in single responsibility areas. These titles then progress through general business management to resource leadership titles.

Title and phase

With regards to ‘title’, I to have had many different titles over the years, from Admin Assistant, to Secretary, to Bursar and I believe there should be a generic title across both Primary and Secondary schools. I feel I don’t quite know where I fit into the school, as my role and title change from one day to the next. If there were a generic title I am sure the LA, Teaching staff, Governors and Parents/Carers would all understand our roles more and appreciate the hard work we put in.

(On-line focus group discussion, 2007)

- 4.34.** The CSBM and DSBM were designed to develop school business management in all phases, without differentiation, in order to encourage expertise and movement across phases. Despite this approach, there is clear evidence that there is differentiation between phases and preferred titles are emerging according to phase (Tables 4.7 and 4.8)

Title	Primay	Middle	Secondary	Special	Total
Bursar	27%	7%	50%	16%	100%
School business manager	18%	3%	70%	8%	100%
Finance title	45%	0	40%	5%	100%
Administration title	67%	0	3%	30%	100%
Office manager	75%	8%	0	17%	100%
Secretary	67%	11%	0	22%	100%
Director	12%	0	88%	0	100%
Multiple title	40%	2%	48%	10%	100%
Other	7%	3%	78%	12%	100%

Table 4.7: Preferred titles across the phases 2007

- 4.35.** Table 4.7 demonstrates that the highest percentage of bursars, school business managers, directors, multiple and 'other' titles are found in secondary phase schools. These multiple titles are predominantly at manager level, eg finance and premises manager, business and finance manager. 'Other' titles which also appear in secondary schools include teacher posts and outsourced consultants as well as emerging support services' titles such as 'head of support services' or 'support services leader'. The highest percentage of finance titles, administration titles, office managers and secretaries are found in primary schools, suggesting that the role in primary schools is regarded as operating at a more functional level and within specific responsibility areas.
- 4.36.** If titles are considered within each phase, primary schools are using the widest range of titles with no clear preference for either title or designated level of operation (Table 4.8). Nevertheless, 26 per cent are called 'bursar', the use of administration titles has reduced since 2004 and a larger percentage of business managers are now evident in these schools. Multiple titles reflect administration levels of operation eg secretary/ administration officer or administrative and finance officer. There is an indication that the greatest amount of uncertainty and churn in relation to job titles is found in primary phase schools.
- 4.37.** Alternatively, middle schools appear to have adopted the preferred title of 'bursar' with a significant number of 'school business managers'. 55 per cent of special schools are using the titles 'bursar' or 'school business manager' (Table 4.8), yet they also employ significant numbers with administration titles, 'other' and multiple titles usually designated at management and leadership level eg resources manager or finance and business manager. 61 per cent of secondary schools also employ the titles of either school business managers or bursars. They have a high percentage of multiple, teacher or emerging titles. 'School business manager' is the preferred title in secondary schools, whilst 'bursar' is more common in primary, middle and special schools.

Title	Primay	Middle	Secondary	Special
Bursar	26%	51%	28%	38%
School business manager	15%	21%	33%	17%
Finance title	9%	0	6%	2%
Administration title	16%	0	1%	15%
Office manager	8%	7%	0	4%
Secretary	6%	7%	0	4%
Director	1%	0	4%	0
Multiple title	16%	7%	11%	9%
Other	3%	7%	17%	11%
Total	100%	100%	100%	100%

Table 4.8: Preferred titles within each phase 2007

Conclusion

I am still quite shocked at the amount of job titles given for the same role. What are we, when is it going to be decided once and for all who we are, and when is it going to be recognised by everyone in educational establishments how much we have to offer.

(Online focus group discussion, 2007)

- 4.38.** School business management posts differ from school to school and phase to phase and new job titles, reflecting new roles, continue to appear in adverts; for example, 'director of learning services' appeared, early in 2007, in the Times Educational Supplement. The confusion within the profession would suggest that the debate about the role and titles that best describe it is not yet concluded. Those operating within the role, however, are aware of how much their title can convey credibility and status (Figure 4.8).

What's in a title? Well certainly in my previous life, quite a lot. In the City based banking world if you met customers and sold business you would almost certainly have in your title director or vice president. It was felt this gave you credibility in the face of the customers. Support managers, often running huge departments mostly didn't have the same style of title or paid as much. Ring any bells???

Over the past 10 years or so, particularly in local government, the leaders have taken to being called "chief executive", with the next layer of underlings being "business directors" or directors of something...

I guess the point I'm getting to is that we are not making life easy for ourselves. We all seem to agree this is an important job that is seemingly becoming more necessary, it needs to be regularised and set out with a set job description and pay scales. The job is basically the same in all schools, it comes down to size as to whether it's done by a "jack of all trades" or run with a team of specialists looking after say a huge 6th form college. Yet we seem content to confuse the issue by allowing heads and LA's to decided on titles, job descriptions, pay etc, – we ourselves not agreeing titles because we don't like bits.

(Online focus group discussion, 2007)

Figure 4.8: Observations on titles, credibility and status

4.39. Nevertheless, since the development of the CSBM, and its focus on increasing expertise in named responsibility areas, many more know what a school business manager is and can talk knowledgeably about their role. Trends emerging between 2004 and 2007 are:

- a reduction in the number of titles
- a reduction in the percentage of 'administration' titles
- bursar is still the preferred title although a preference is emerging for the title of school business manager
- the numbers of managers and directors are increasing
- the percentage of headteachers returning the questionnaire and indicating that they fulfilled the role has fallen

4.40. Like the chief operating officers researched by Bennett and Miles (2006), the school business manager role is unique in each school. There are, however, preferred approaches emerging in response to school phase and size. There is an indication that there is a movement away from operating primarily at an administration level and although business managers in smaller and medium sized primary and secondary schools must still work at this level, they have increased leadership activity and are beginning to increase operating as managers. NCSL's CSBM and DSBM would appear to be the primary influence in widening this role into the provision of greater support for governors, senior management teams and headteachers. Nevertheless, there is still some way to go in improving management support in schools. As more of these business managers complete the CSBM, consolidate their role and gain experience before taking further qualifications, there may be a requirement for specialist management short courses that will prepare them for the DSBM.

4.41. It is clear that there is still confusion over this school business management role and the most appropriate title to define it. This uncertainty is a feature of an emerging profession and, as such, encourages debate of how it will evolve. This debate also explores how effective business managers operate in their schools, career progression and professional development requirements. Section 5 will discuss development of the profession and section 6 will pick up the themes of sections 3 to 5 exploring effective school business management now and in the future.