

Case Study: School Bursar - Ivy

What do you do?

I'm responsible for all the financial management of the school: preparing a budget, presenting it to governors and then managing the whole process to ensure that the budget is used effectively.

I manage the building, so I'm responsible for all health and safety and the actual building structure including maintenance, contracts and repairs.

I'm also the systems manager, which means I'm responsible for the management information systems of the school and the pupil data. And within that, I have to make sure that the school is effectively run with the resources that we have.



Quite a few bursars are just responsible for the financial management in their schools but, within this school, I'm also responsible for the HR (human resources) management and that covers development of support staff and various other responsibilities within HR like employee relations and absence management. So there's quite a strong HR element to the role as well.

What is your background?

Prior to taking on the bursar role, I was HR (human resources) manager for two very large organisations and also I'm a qualified trainer.

But what encouraged me to apply for the job was that I get a real buzz out of making sure that finance meets the resource requirements and within a school, being a bursar, that's exactly what you've got to do at all times: make sure that the budgets balance. So I get a real buzz out of that and that's what attracted me to the job.

What characteristics do you need to be successful in your job?

You certainly need patience because there's never-ending change. I think you also need to have, not necessarily an accounting background, but a desire to work with figures. Also, you must have a desire to want to work with IT because the job has changed from having a paper background to an IT background and without that desire you would struggle, big time, in the job.

You need to get on well with people and be able to face anything as it hits you, because it really does hit you in schools, no two days are the same. You need to be adaptable and able to manage change very, very quickly. I think this year we've had 102 changes in the way the school operates, so you have to be able to embrace change in a big way.

So you need patience, particularly, and to be able to deal with people very, very fairly and equally because we've got quite a few members of staff and there's always conflict.

What other jobs could you do using the skills from this job?

I think in the age that we're in now, schools are businesses. From being a bursar, you could certainly move into a role of an assistant head because a lot of the functions that deputy heads and head teachers have to do now can be quite clearly taken over by the bursar.

Certainly, there's a training element within the job, so you could use the skills of training and developing people and performance management within any management role. A lot of the work that I do now could be transferred into a management role outside this particular sector.

What changes will there be in the future?

The changes that are going on particularly for bursars at the moment are concerned with the qualification of school business managers and that involves taking on a lot more responsibility from the head teacher, so that's a massive change for bursars.

That's where I am at the moment, taking over the HR responsibilities, the buildings, the health and safety aspects of the school, some policy writing, so the bursar's job is really, really changing and it's for the better because we're taking a lot of responsibilities from the head teacher.

And I think that's going to happen over the whole country, as the government is actually funding the Certificate of School Business Management and it's not costing the schools anything to actually train their bursars.

Also, because of the technological change that's going on at the moment, you've got a lot of learning to do. We've gone from a situation where all the accounting was done in a blue book to now doing it all on computer systems and a lot of information is sent direct to government. So there are a lot of technical changes there and we're becoming more IT orientated rather than paper orientated. There are lots and lots of very positive changes coming up that people should be embracing.

What are the biggest challenges in your job?

The biggest challenge is the constant changes and keeping up to date. Every week, there's something new that I need to learn.

Another of the challenges that I face every day is ensuring that the budget is effective. It would be true to say that budgets for schools are very tight, so for it to be effective, a budget has got to be really well managed and it's got to be well presented, and that can be a headache on a daily basis. The school needs more and we just don't have the resources to fulfil our requirements, but it's still a positive place to be.

Are there many opportunities to enter this career?

I'd say that in most schools the bursars stay for a substantial amount of time. So the only time there's an opportunity is if somebody's moving out of the town or has got promotion and moved on to a different school.

There are not very many vacancies and when there is a vacancy, it is exceptionally competitive. The reason for that is because the expectations of schools are changing. The job is no longer the sort of job where people think, "It fits in with my children's lifestyle." It is actually a business-type job. So it's not the old 'stick plasters on people and look after them' kind of job. It is a hectic job.

But people stay in the job for a long, long time. Once you're in there, you're actually hooked. So it can be quite difficult to get into this type of job.

What do you like about your job?

The unpredictability of it. It's a challenge every day when you walk into school. It's being with the children, it's being with the staff, it's knowing that I'm making a positive contribution to the well-being of the school. I absolutely adore the job. I get a buzz from it.

I would recommend it to anybody that likes a challenge in their life. It's not a job that you can just sit back and be complacent about. It keeps you on your toes, so I'm constantly learning. It's a wonderful, wonderful job.

What do you dislike about your job?

Really, the only thing I would say I dislike about it is the frustration of not having adequate funds to develop the school in the way that we would like it to develop because each year we're having to make do, whereas it would be far nicer to have the resources to be able to move the school forward in leaps and bounds.

What are your ambitions?

In my current job, I'm classified as a bursar, but I would like it to be expanded to become a school business manager role, so I can support the school's development.

That's not always possible within a primary school and I can recognise that and acknowledge it, so ambitions outside of my current job would possibly be to move into a secondary school or a college of further education, where the school business manager role is more readily recognised.

But, I would like to take up the school business manager role in a primary school as I think it has a lot more value because the head teacher's under a lot more stress and has to cope with a lot more day-to-day, mundane tasks. So

there are ambitions within my current job and outside as well.

What advice would you give to someone interested in your career?

I'd certainly advise them to keep up to date with all that's going on in education at the moment, because what's happening at government level has an impact on the school. In an interview situation, schools would be more positive about somebody who has kept abreast of educational and financial changes and what the government is hoping to do with standards over the next three years.

It's worth them speaking to somebody who is already a school business manager or bursar to make sure that they understand the stresses and challenges in that job, because it has changed dramatically.

I've only been in it for five years and what it was like five years ago and what I currently do are totally different. So I think people need to find out from an individual who's already doing the job what it actually does entail before they start making appropriate applications.

A day in the life

8:30 am - 9:30 am

Meet with caretaker and discuss issues that may have arisen. Ensure that the building is compliant with health and safety and is fit for use by students and staff.

9:30 am - 10:00 am

Meet with IT technician and set priorities for the day/week. Discuss any IT issues that may have developed and seek a solution.

10:00 am - 1:00 pm

Carry out financial procedures: order resources, pay invoices, bank income. Check bank account. Ensure that all school figures reconcile with local authority information.

1:00 pm - 1:30 pm

Do first aid duty and try to get some lunch.

1:30 pm - 4:00 pm

Undertake any project work concerning development of building and have discussions with suppliers. Carry out all personnel updates and ensure that data on the management systems is clean and of excellent quality. Discuss with head teacher and senior management team any issues relating to the budget or projected plans.

Please note that each day is different, so days can vary quite widely from this example.