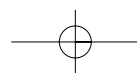
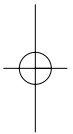
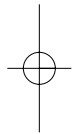


How Headteachers Cope with LMS

Dave Sexton
Ashcroft International Business School



Abstract

One of the major, and most often quoted, problems facing schools is the volume of administrative activity now required of them. Arguably, the largest source of administration is financial management, initially created through the 'Local Management of Schools' (LMS) initiative. The way in which a headteacher manages to cope with LMS will have a real impact on school performance, and the range of schools type could influence the headteacher's managerial options.

The aim of this paper is to examine how headteachers cope with the financial management requirements resulting from LMS, and the influence of school type and size on the coping mechanism employed. To achieve these aims, broad coping mechanisms were identified from a review of literature, which were applied to headteachers within the County of Essex through a questionnaire based survey. Detailed interviews were completed with a cross section of headteachers, and these results triangulated against documentary evidence.

These results suggest that a range of mechanisms are apparent within schools, and although headteachers are coping, as many as 43 per cent are absorbing the additional burden. A total of three per cent of schools were identified as applying a mechanism likely to fail. School type was found to influence the headteachers coping mechanism.

Introduction

The Education Reform Act 1988 required all schools to have devolved budgetary responsibility, through the mechanism which has become known as LMS (Local Management of Schools). By devolving financial responsibility and accountability to the school, LMS considerably changed the workload evident within a school, with a substantial increase in the administrative burden.

The Education Reform Act 1988 also required schools to introduce a national curriculum, together with statements of practice for various subject areas. Subsequent Acts, culminating in the Education Act 1998, have added additional burdens including performance information, inspection, and vocational training.

Within this changing environment the key figure for each school has been the headteacher, who has had the role of co-ordinating and managing the school.

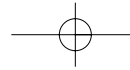
The vast majority of studies in this area have concentrated on large secondary schools, however, the work of Bullock and Thomas (1997) and Bowe and Ball (1992) identify differences in management issues facing a large secondary school and a small primary school, with a teaching head.

This paper seeks to examine how headteachers are coping with the increased financial workload resulting from LMS. It also seeks to identify whether the coping method employed by headteachers is influenced by the type of school, being primary or secondary.

Background

In the article "Absorbing LMS: The Coping Mechanism of a Small Group" Laughlin *et al.* (1994) advanced the proposition that "doing LMS involves a complex, time-consuming paper-chasing, housekeeping exercise with distinct anxiety generating aspects". Laughlin *et al.* go on to argue that the burden of LMS falls upon small groups, which inevitably include the headteacher. Hence to understand how the small groups have coped with the change, it is first necessary to appreciate the nature of headship (Burgess *et al.*, 1992).

The formal responsibility for decision making is delegated to headteachers and governors (Waterman, 1998), which would appear to spread the work across a number of individuals. However, the headteacher is responsible to the governing body for ensuring *sound systems of*



internal control, and that *LEA financial regulations or DFEE financial requirements are implemented*. (Ofsted, 1993: 4). Additionally, the burden of financial planning and monitoring falls squarely on the shoulders of the headteacher, although where resources allow, these roles may be delegated.

Interestingly, Her Majesty's Inspectors (HMI) found that financial control (the control of monies) within schools far exceeded financial management (financial planning and decision making), to the extent that Inspectors judged financial management unfavourable in two thirds of primary schools and half of secondary schools (Ofsted, 1997: 1). This clearly indicates concentration on the short term at the expense of the crucially important longer term, and appears to support the view that headteachers are doing what must be done to cope with the day to day demands placed upon them.

A principal tool used in holding the governors accountable for the proper running of the school and use of school resources, is through an annual report and parental meeting as specified in the School Standards and Framework Act 1998 (Waterman, 1998). Since the enactment of the original Education Reform Act, the requirement for an annual report and meeting have been a point of law, and it should be noted that they are a "Governors' Report and Meeting". However, an early study noted that in 97 per cent of cases the headteacher took the lead, and in 52 per cent of schools sampled the governors were not involved in writing the report (Mahoney, 1988). Once again, this indicates that the greatest burden falls on the headteacher.

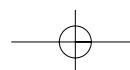
The initiative expected much of the additional burden to fall, together with the authority, on an increased role for governors. Thomas and Bullock (1994:32) found that "*Skilled governors are not evenly distributed across schools*" and that there was "a question over the commitment of LEA Governors". Furthermore, it was found that headteachers' workload spent "*too much time on administration and financial matters*". Hence, where the lack of active governors exists, there is much evidence that the headteacher fills the void and so takes the brunt of the new responsibilities.

Undoubtedly the role of headteachers has changed, to an extent that from 2001 all newly appointed headteachers must possess a professional headship qualification as a result of the "Teaching and Higher Education Act" 1998 (Waterman, 1998). This training should improve the management skills of future headteachers, and so assist in the application of an appropriate coping mechanism. However, this leaves the vast majority of headteachers currently working throughout the Country without appropriate training, and it is the coping methods employed in these headships that forms the basis of this study.

Cuthbert (1984: 39) gives some explanation for how headteachers cope: "*the study of management in education is an eclectic pursuit, with models borrowed from a wide range of disciplines*". Cuthbert also suggested a five model framework, with analytical-rational, pragmatic-rational, political, ambiguity, and phenomenological models. This is similar in essence to Bush (1986), who proposed five models of management within educational establishments, being formal, democratic, political, subjective, and ambiguity.

Ball (1987) concentrated on the leadership style of the headteacher, and proposed a four style model of interpersonal, managerial, adversarial, and authoritarian. Several other models have been advanced which overlap the work of Bush and Ball which include those by Theodossin (1983), Ellstrom (1983), and Sergiovanni (1984).

Indeed, the behaviour of the headteacher is paramount to the way the school community performs, in that it is the leader who has the major influence over the structure and culture of the school. This can be seen by the assertion that when the school is successful, the headteacher is successful, but when a school fails, it is invariably the headteacher who is blamed (Goffman, 1971).



In their model, Laughlin *et al.* (1994) build upon the work of Bush and Ball and argues that in order to manage the change, headteachers adopt a coping mechanism in relation to their involvement with LMS and their management orientation. Three broad coping mechanisms are proposed, with two of these mechanisms containing subgroups.

- **Absorbers** have a dominant and full involvement in LMS, and contains the subgroups;
 1. Soaker Sinkers insulate the school entirely and freely shoulder the burden at considerable cost to themselves. Seen as the most likely to fail, in this case the headteacher absorbs the full impact of LMS.
 2. Informer Involvers try to protect the community while keeping them informed. The need to share the workload is identified but not practical.
 3. Autocrats treat LMS as another task for them to control.
 4. Wheeler Dealer is an autocrat with a strong entrepreneurial streak.
- **Managers** have delegated or abdicated the financial role, opting for a people or educational orientated approach and contains the subgroups;
 1. Entrepreneurial who retains a strong involvement in income generation and school publicity.
 2. Educational who stays away from finance through delegation.
 3. Pastoral who abdicates from financial management, usually through dumping the issue on a deputy.
- **Informers** have balanced their involvement in LMS and their management style between people and task orientation.

As the most contemporary, and post LMS implementation date, framework for understanding headteachers coping mechanisms, this three band framework will be used to conceptually underpin this study.

Methodology

The aims of the primary research were achieved by means of a three stage approach. Firstly, 623 schools were surveyed to investigate headteacher and school background, and the management style used. Secondly, a sample of headteachers were interviewed to verify the data collected in Phase 1 and to gain further understanding of the management style applied. Thirdly, documentary evidence was reviewed to consider the impact of the headteachers behaviour on school performance.

Phase 1: A questionnaire survey was implemented based upon all schools within the geographical area of Essex. Essex was chosen due to the school mix in evidence within it, ranging from inner city, urban through rural, and coastal communities. The questionnaire was piloted with three headteachers prior to despatch in April 1999. Responses were analysed using the SPSS database application.

The questionnaire was designed to obtain the background of the school and headteacher, before ascertaining the coping mechanism employed (Appendix A). Responses to questions in the groupings shown in Table 1 would indicate a specific coping mechanism being applied.

Table 1
Allocating Coping Mechanisms to Headteacher responses

Coping Mechanism	High response to Question no:	Low response to Question no:	Agree with Question no:	Disagree with or Abstain from Question no:
Absorber:				
Soaker Sinker	1	2	3,4,5,9	6,7,8
Informer Involver	1	2	3,4,5,6,9	7,8
Autocrat	1	2	3,4,7	5,6,8,9
Wheeler Dealer	1	2	3,4,7,8	5,6,9
Manager				
Entrepreneurial		1,2	8	3,4,5,6,7,9
Educational		1,2		3,4,5,6,7,8,9
Pastoral		1,2	5	3,4,6,7,8,9
Informer		1,2	3,5,7	4,6,8,9

Phase 2: In order to validate conclusions on coping mechanisms drawn from phase 1, this stage of research favoured an inductive approach. Semi-structured interviews were carried out with a sample of seven headteachers, selected using a stratified approach. Interviews lasted between 1 and 3 hours, and notes were taken throughout. All interviews were completed in the headteacher's particular school. The sample size was limited by resources, and so was designed primarily to verify the conclusions drawn from Phase 1. Additional findings from this Phase could only be taken as organisationally specific.

Phase 3: The most recent Ofsted report was analysed for each of the schools involved in Phase 2, with particular reference to the sections on leadership and management. Reports were checked to ensure that they related to the headteacher currently in post. The report as a whole was compared with the information gained in the first two phases of research to verify the information collected.

Findings of Phase 1

At the end of the return period, usable responses totalled 341, a usable response rate of 55 per cent. The higher than expected rate gives some indication of the interest in this area.

Of the 341 usable returns, 299 were from primary school heads, with the remaining 42 from secondary schools. The range of school roll ranged from 4 schools with less than 50 pupils, to 28 schools with in excess of 1,000 pupils. The nature of the schools submitting returns is summarised in Table 2, split between primary and secondary schools.

Table 2
The Nature of Schools submitting useable returns

Nature of Schools	Primary		Secondary		Total	
	no.	%	no.	%	no.	%
Length of Headship						
< 5 years	107	35.8	20	47.6	127	37.2
5-10 years	75	25.1	16	38.1	91	26.7
> 10 years	117	39.1	6	14.3	123	36.1
Total	299		42		341	
School Roll						
<50	4	1.4	-	-	4	1.2
51-100	26	8.7	-	-	26	7.6
101-200	88	29.4	-	-	88	25.8
201-500	174	58.2	-	-	174	51.0
501-1,000	7	2.3	14	33.3	21	6.2
>1,001	-	-	28	66.6	28	8.2
Total	299		42		341	
Heads time spent teaching						
< 5%	108	36.1	22	52.4	130	38.1
5-25%	131	43.8	19	45.2	150	44.0
> 25%	60	20.1	1	2.4	61	17.9
Total	299		42		341	

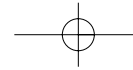
An analysis of the nature of the schools returning useable questionnaires highlights the level of relatively new headteachers at 37 per cent, which could suggest that there have been some substantial moves in this workforce. The proportion of time spent teaching highlights some of the specific problems for small schools, with 20 per cent of primary school headteachers teaching for more than 25 per cent of their time.

The quantitative research data gives an insight into the coping mechanism applied, which are grouped into Absorbers, Managers, and Informers in Table 3, once again split between Primary and Secondary schools.

Table 3
Coping Mechanisms employed by headteachers

Coping Mechanism	Primary		Secondary		Total	
	no.	%	no.	%	no.	%
Absorbers	140	46.8	8	19.0	148	43.4
Managers	61	20.4	13	31.0	74	21.7
Informers	98	32.8	21	50.0	119	34.9
Total	299		42		341	

Analysis of data shows a clear differentiation of broad coping mechanism between primary and secondary schools, with over 46 per cent of primary headteachers absorbing the increased workload of LMS. Analysing the returns of Absorbers further identified that 10 of this group were Soaker



Sinkers, and so fully insulating their staff from the impact of LMS, which Laughlin *et al.* (1994) suggests puts them 'under considerable personal pressure'. A further 42 from this group were Informer Involver, and stated an intention to involve others, but an inability due to lack of resources.

Findings of Phases 2 and 3

Interviews were completed for seven schools, covering the range of types and coping mechanisms identified in Phase 1. Of those interviewed five were primary schools and two were secondary schools. The sample concentrated on Absorbers, with three selected, as this mechanism was identified by the framework as the most likely to fail. In addition, two headteachers were selected who appeared to be coping through Management and two through Informing.

The nature and apparent coping mechanism of the schools selected are shown in Table 4.

Each of the seven schools visited as part of the qualitative study were transcribed immediately after the interview was complete, from notes taken during the interview. The structure of the interview was semi-structured, with open questions covering the background to the school, structure, time, tasks and training, sharing the burden, insulating staff, cultural effect, entrepreneurship, and finally an overall view of LMS. An analysis of the coping mechanism applied by each school is given below, together with documentary evidence gleaned from Ofsted.

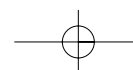
Table 4 – Nature of sample for Phase 2 research

School	Coping Mechanism	Type	Roll	Length of Headship
A	Absorber (Soaker Sinkers)	Primary	51-100	>10
B	Informer	Secondary	>1,000	5-10
C	Manager (Educational)	Primary	501-1,000	>10
D	Informer	Secondary	>1,000	<5
E	Manager (Entrepreneurial)	Primary	101-200	<5
F	Absorber (Autocrat)	Primary	201-500	>10
G	Absorber (Informer Involver)	Primary	201-500	>10

School A

The headteacher of School A confirmed her behaviour as an Absorber. The headteacher has completely insulated her staff from LMS, and deals with all financial issues. The teaching deputy deals with education issues, but attempts to involve her in sharing the burden have failed.

The headteacher attends school for 9 hours per day, plus most evenings, weekends, and holidays, summing up her commitment with 'it is a lifestyle not a job'. The headteacher's current commitment in terms of finance is between 11 and 25 per cent of available time. She feels poorly supported by the LEA and Governors (who are supportive but lack skills and time), and has a low opinion of the training available.



The headteacher clearly felt unhappy with her workload, especially LMS. She feels frustrated, very busy, and unappreciated by Ofsted who “expect a teaching headteacher of a small school to manage the same amount of bureaucracy as a large secondary school”. The headteacher’s view of LMS is not favourable, adding the comment “the education of the children will not suffer due to the professionalism of the staff, it is the staff themselves, and the experience the pupils could have received that has suffered.”

The headteacher is clearly struggling to cope, evidenced by her declaration that following 12 years as a head, she will be leaving from next term to return to the classroom in a different school.

The recent Ofsted report on the school reported serious weaknesses in leadership and management. It reported that “the headteacher provides caring leadership, but no strong steer ... not enough information was provided to governors to allow them to fulfil their role.” It was found that the financial systems and procedures were efficient and sound but set a clear action point to “effectively involve teachers and governors in the process of leadership and management”.

School B

The headteacher of school B confirmed his strong role in all things financial, however, there is little evidence of insulating staff from the impact of LMS. With 97 teachers, including nine non teaching managerial posts, there is much delegation of the tasks involved in LMS, but a clear retention of authority. Having a background in financial management, this headteacher has set the structure of his large secondary school to mirror a medium sized business, and there is clearly much financial focus involved. His enjoyment of finance was summed up by his joy at “coxing and boxing the budget”, or moving the budget around, “manipulating the resources to make the best from them”.

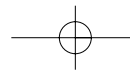
The headteacher spends between five and ten per cent of his time on finance, which includes convening the Finance Committee of the Governors, and monitoring budgets. On the impact of LMS, the headteacher stated “LMS has had a cultural effect on all schools, making them performance orientated, and aware of the financial implications of decisions. The success of a school within the new regime depends heavily on the ability of the headteacher.”

The research clearly supported the Phase 1 finding that the coping mechanism employed was that of Informer. This headteacher sees himself as effectively the chief executive, building a structure around himself to maximise the schools performance. The Governors fill the roll of non-executive directors, holding the headteacher to account. The headteacher was a strong personality, with a dominant involvement in key decisions. With the level of support and resources available, there appear few problems in coping with the burden of LMS.

The research findings were well supported by the Ofsted report on the school, which identified good strategic management, and a headteacher showing strong leadership. It was reported that “the resources of the school were efficiently managed....and financial control good”. Additionally, the governing body were reported as effective and positively contributing to the development of the school.

School C

School C is led by a head with 23 years experience who spends very little time on finance leaving virtually all aspects to the Finance Manager, and only deals with odd problems as they arise. The school is large enough to have a non-teaching deputy, and to give non-teaching time to teachers who head curriculum areas, and each of these is encouraged to consider the resource implications of their actions. The headteacher does not perceive LMS as a burden, and has used a mixture of delegation and the use of experts, to keep it minimal. The use of exception management certainly appears to have greatly reduced the impact on the headteacher’s time. No member of staff is insulated from the realities of LMS.



The headteacher is of the opinion that “the reality is that the over riding culture is that of education, and a desire to do well for the pupils. Finance is of secondary importance.” Overall, the head considers that “LMS has improved performance of schools, principally by linking resources to performance, and making headteachers more accountable”.

Identified as coping through delegation or abdication, the interview clarified that delegation was the over-riding technique. The headteacher seemed unconcerned about LMS and its implications while giving the clear impression of being satisfied with the structures created. His interest remained clearly educationally focused, but with the occasional glance at the financial position.

The Ofsted inspection reported that “the school is well led by a headteacher committed to raising standards” and that “development was shared by staff, governors, and parents”. Administration was found to be good, and where staff managed budgets it was seen to be done well.

School D

With a perceived coping mechanism of ‘Informer’, this relatively new headteacher did indeed prove to be mixing large elements of delegation with retention of control and direction. This large school had been seen as failing educationally, and the head was appointed just two years ago to solve many of the evident problems. The previous head had kept all things financial to himself, and had built a comfortable reserve, but was found by Ofsted to be performing unsatisfactorily.

The structure is best described as a network, with two deputies, five senior teachers, and twelve departments. Each is given responsibility for a budget to fulfil their task.

The headteacher spends between five and ten per cent of her time on the school finances, but considerably more on related issues. Decisions tend to be collegiate, with input from the finance manager and other members of staff. LMS is not seen as a burden, with the majority of tasks, and all of the routine tasks, delegated. The Governors take a keen interest in the school finances. Staff are not insulated from the impact of LMS.

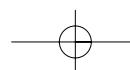
The culture of the school has clearly changed, and although the emphasis remains very much that of education, resource and performance management have increased in visibility. The headteacher is of the opinion that “overall school performance has definitely been improved by LMS.”

Showing clear characteristics of an informer, it appears that the school is improving. An interesting aspect of that is the change from a headteacher with an absorber coping mechanism to that with an informer mechanism seems to have considerably impacted on the school.

The last Ofsted report prior to the appointment of the current headteacher found severe weaknesses, with senior managers overloaded. The leadership was financially sound with “a prudent approach to budgeting resulting in high balances less successful in giving educational value for money”. The most recent report on the new (current) headteacher found considerable improvements in leadership and financial management.

School E

The headteacher of School E proved to have a mixed approach to dealing with the impact of LMS. Having delegated budgetary responsibility to curriculum leaders and finance tasks to a designated finance manager, the headteacher spends considerable time raising more finances. The headteacher declared that the vast majority of time spent on finance was on income generation through bidding for grants and sponsorship. He clearly enjoyed this element of his job, and showed most enthusiasm when explaining the financing of a new IT suite. He enjoyed going his own way on entrepreneurial activities, and sees this as “a method of considerably increasing the resources available to the school.”



Staff are fully encouraged to appreciate the financial implications of any actions. He believes that LMS has caused the culture to change to a performance and accountability culture, which he views as "beneficial to the pupils, parents, and to achieving the best value for money."

Part manager, part fund-raiser, this headteacher clearly enjoys the financial freedom offered by LMS, and sees it as the reverse of a burden.

The last inspection report declared that "leadership and management are sound". However, parts of the structure were seen as unclear and overlapping, while the finances were reported as "managed efficiently, with good planning and control".

School F

Identified as an absorber, this headteacher has held a headship for some considerable time at a variety of schools. She spends between five and ten per cent of her time on finance, and does not consider this too burdensome. Staff within the school are expected to concentrate on educational issues, leaving the headteacher to worry about financial consequences, however they are made aware of the broad financial position.

The headteacher has considerable help in managing the school from the very active governing body. The culture of the school appears bureaucratic in nature. The headteacher considers that "LMS is good where the leadership is good, the quality of the leadership is critical to the success of a school, and one thing the LMS initiative has done is create harder, and tougher headteachers, resulting in improved education for the pupils."

The interview data supported the Phase 1 finding that this headteacher absorbed the LMS workload, but this was considerably compensated by the active support of governors. This school is very popular in the area, and over-subscribed with predominantly active parents, which may go some way to explain the availability and enthusiasm of the governing body.

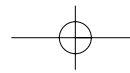
The Ofsted report declared that finances were effectively managed, developments carefully costed, and budgets efficiently controlled. The headteacher was found to be strong, giving clear direction.

School G

The headteacher of this medium sized primary school has a background in banking and spends between 11 and 25% of his time on financial management. His normal working week varies between 60 and 70 hours, with increasing demands upon holiday times. He does wish that "finance took less of my time so that I could concentrate on educational issues, especially behavioural policies, performance monitoring, and additional teaching". The head considers his school "fortunate in having honest, committed and enthusiastic governors, but no professionals".

Staff are on the whole insulated from the impact of LMS, in that they are not troubled by the ongoing financial issues, and are left to concentrate on giving the pupils the best education possible. The headteacher considers that "LMS has facilitated the improved management of schools, but it has not in itself improved the quality of education. Improved performance comes with the way in which the headteacher deals with LMS, and whether the negative impact of removing the head can be avoided."

The Phase 2 research proved this headteacher to be an absorber Informer Involver. Clearly struggling to cope with the workload, it is having some considerable impact on his life. The size of the school, the resource impact of the high behavioural problems of pupils, and the lack of skilled governors appear to have left the headteacher with few choices but to cope through absorbing LMS.



The Ofsted report on this school supported this view, in that the school was found to have 'strong leadership and financial control' from the headteacher but 'little governor involvement in setting direction'.

Conclusions and Implications

The aim of this study was to examine how headteachers are coping with the increased financial workload resulting from LMS and whether the coping method employed by headteachers is influenced by the type of school, being primary or secondary.

The dataset was created in 1999 and there have been a number of changes to the educational environment since that date. However, the workload resulting from LMS has not changed, despite a number of superficial changes, including the introduction of a common reporting format, there has been no move to fundamentally reduce the burden. Indeed, recent funding shortfalls recorded throughout spring 2003 highlight the increasing problem with school financing and the headteacher's burden in managing this facet of school life. Hence conclusions drawn from this dataset remain a valid indication of the issues faced in schools.

The quantitative findings indicated that a wide range of different coping behaviour is evident within schools in Essex. From the qualitative research it can be concluded that six of the seven headteachers are coping with the additional burden of LMS, although one of these six (school G) is struggling to cope. The relevant Ofsted reports show that the six schools are achieving acceptable standards and their management is viewed as good. In the remaining case, the qualitative research identified a headteacher (School A) clearly failing to cope with the burden, a view shared by the inspectors, and the headteacher involved.

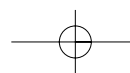
These findings seem to suggest that the majority of headteachers are coping with LMS, but there are headteachers who are struggling. Given the importance of the leadership of the headteacher evidenced in the literature review, the likelihood of a school performing well is greatly influenced by the coping mechanism employed by its headteacher. Hence the mechanism employed by the failing headteacher (which Laughlin *et al.* would describe as *absorber soaker sinker*) may give an indication of the number of headteachers currently struggling with the burden upon them. In total ten schools, or three per cent of the 341 respondents were analysed as using the mechanism absorber soaker sinker.

Additionally School G was seen to be coping, but at considerable personal expense to the headteacher. There was a sense that the school circumstances (small, high rates of behavioural problems with low economic wealth of parents) gave the headteacher few options in dealing with LMS.

The school type (primary or secondary) does impact on the coping mechanism employed by the headteacher, with nearly 47 per cent of primary school headteachers employing an 'absorber' mechanism, against 19 per cent in the secondary sector. Given the evidence from the Phase 2 research that it is those headteachers using the absorber mechanism that are most likely to struggle (two of the three interviewed), this raises some concern for this particular sector.

The general theme that small school headteachers are more likely to employ an absorber strategy supports the suggestion that the impact on small schools is far harder than that on large schools, due to the differential of increased workload against staff to absorb it. Small school headteachers are put under greater pressure to absorb the burden of LMS when there is little professional support from governors, which may be related to the economic wealth of the immediate environment.

Headteachers have many concerns and ideas regarding LMS which should be researched and considered further. The isolation of the headteacher was a theme running through the case studies, with the breakdown in old networks through competition and politics, and the removal of the traditional LEA support mechanisms.



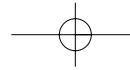
Appendix A Essex Headteachers' Questionnaire

Background	School Type:	Primary	<input type="checkbox"/>	Secondary	<input type="checkbox"/>
Background	School Roll (pupils):	<51	<input type="checkbox"/>	51-100	<input type="checkbox"/>
		101-200	<input type="checkbox"/>	201-500	<input type="checkbox"/>
		501-1,000	<input type="checkbox"/>	>1,000	<input type="checkbox"/>
Background	Length of Headship (yrs):	<5	<input type="checkbox"/>	5-10	<input type="checkbox"/>
		>10	<input type="checkbox"/>		
Background	Percentage of your time normally spent teaching:	<5	<input type="checkbox"/>	5-25	<input type="checkbox"/>
		>25	<input type="checkbox"/>		
Q(uestion)1	Percentage of your time spent on finance and budgets:	<5	<input type="checkbox"/>	5-10	<input type="checkbox"/>
		11-25	<input type="checkbox"/>	26-50	<input type="checkbox"/>
		>50	<input type="checkbox"/>		
Q2	Percentage of time spent out of your own school:	<25	<input type="checkbox"/>	25-50	<input type="checkbox"/>
		51-75	<input type="checkbox"/>	>75	<input type="checkbox"/>

Agree Neither Disagree

Q3	I have a dominant involvement in finance:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q4	I have attempted to insulate my staff from the impact of Local Management:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5	I am people, rather than task, orientated:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q6	I want to share the burden of finance, but am unable to do so:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7	I am responsible for the school finances and as such must be the dominant force:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q8	I enjoy the entrepreneurial element of finance:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q9	I have insufficient time for education issues due to the pressures of finance management:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

N.B. Question numbers and background not included in despatched questionnaire, shown here for ease of reference to Table 1.



References

Ball, S. (1987), *The Micro-Politics of the School*, Methuen & Co.
 Banks, O. (1976) *The Sociology of Education*, Third Edition, Batsford
 Bell, L. & Rhodes, C. (1996) *The Skills of Primary School Management*, Routledge.
 Bennis, W. (1989) *On Becoming a Leader*, Addison Wesley
 Bowe & Ball (1992), *Reforming Education & Changing Schools*, Routledge.
 Brown, A. (1998) *Organisational Culture*, 2nd Ed. Pitman
 Bullock, A. & Thomas, H. (1997) *Schools at the Centre ?*, Routledge.
 Burgess, R.G. (1984), *Headship: Freedom or Constraint?*, in Ball, S.J. *Comprehensive Schooling: A Reader*, Falmer Press
 Burgess, R.G., et al. (1992), *Case Studies: A Thematic Look at Issues and Problems in Resourcing Sheffield schools*, Sheffield Education Dept.
 Bush, T. (1986), *Theories of Educational Management*, Paul Chapman Publishing Ltd.
 Bush, T. et al. (1993), *Managing Autonomous Schools*, Paul Chapman Publishing Ltd.
 Caldwell, B. & Spinks, J. (1988), *The Self Managing School*, Falmer Press.
 Cullingford, C. (1997) *The Politics of Primary Education*, Open University Press.
 Cuthbert, R. (1984) *The Management Process*, Open University Press.
 Davis, S.M. (1984) *Managing Corporate Culture*, Ballinger.
 Deal, T. & Kennedy, A. (1982) *Corporate Cultures*, Penguin
 DePree, M. (1993) *Leadership Jazz: The Art of Conducting Business through Leadership, Followership, Teamwork, Touch, and Voice*, Dell
 Drucker, P. quoted in Rifkin, G. (1996) *Leadership: Can it be Learnt?*, Forbes
 Ellstrom, P.E. (1983) *Four Faces of Educational Organisations*, Higher Education Vol 12.
 Feintuck, M., (1994) *Accountability and Choice in Schooling*, Law and Political Change Series, Open University Press.
 Fidler et al. (1989) *The Effective Local Management of Schools*, Longman
 Goffman, E. (1971) *The Presentation of Self in Everyday Life*, Penguin
 Handy, C. (1978) quoted in Brown, A. (1998) *Organisational Culture* 2nd Ed. Pitman
 Handy, C. (1991) *The Age of Unreason*, Business Books
 Hargreaves, D. (1989), *Planning for School Development: Advice to Governors, Headteachers, and Teachers*, DES.
 Harrison (1972) quoted in Brown, A. (1998) *Organisational Culture*, 2nd Ed. Pitman
 Hofstede, G. (1997) *Cultures and Organisations: Software of the Mind*, McGraw Hill
 Johnson, G. & Scholes, K. (1999) *Exploring Corporate Strategy*, 5th Ed. Prentice Hall.
 Knight, B. (1993) *Financial Management of Schools*, Heinemann
 Laughlin, R. et al (1994), *Absorbing LMS: The Coping Mechanism of a Small Group*, University Press.
 Levacic, R. (1995), *Local management of Schools*, Open University Press.
 Mahoney, T., (1988), *Governors, Accountability, and Parents*, W.E.A. Nottingham (ISBN 0901977098).
 Ofsted, (1993), *Keeping your Balance*, Audit Commission
 Ofsted, (1997), *Managing Financial Resources Effectively in Schools*, Office for Standards in Education, HMSO
 O'Toole, J. (1996) *Leading Change: The Argument for Values Based Leadership*, Ballentine
 Peters, T. & Waterman, R. (1982) *In Search of Excellence*, Harper Collins.
 Peters, T. (1994) *The Tom Peters Seminar*, Vintage Books
 Sergiovanni, T.J. (1984) *Leadership and Organisational Culture*, University of Illinois Press.
 Theodossin, E. (1983) *Theoretical Perspectives on the Management of Planned Educational Change*, British Educational Research Journal, Vol. 9, No. 1.
 Thomas, H., Bullock, A. (1994), *The Impact of Local Management on Schools*, University of Birmingham, QEd, Staffordshire
 Waterman, C. (1998), *The Education Acts 1998*, The Stationery Office

