

## APPRAISAL FOR BURSARS

Cost: from £1500

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The appraisal will be an evidence-based review of the performance of the Bursar in relation to their specific responsibilities as set out in their job description, including the following aspects:

- Leadership and relationships, administration, management
- Strategic development of their area of responsibility within the school; how they support the school's aims
- Planning and policies
- Deployment and management of staff
- Communication and consultation; dealing with parents
- Professional and personal development

This is a supportive but systematic 360-degree appraisal which seeks to understand how a Bursar is performing through careful consultation with key stakeholders in the school.

### METHODOLOGY

- Preparing questionnaires and reading key documents provided by school. The Bursar will be asked complete a detailed self-evaluation.
- The appraiser will need a day at the school for meetings with the Bursar along with the Head and various key members of staff. Most of the rest of the work would be done remotely.
- The appraiser may arrange to observe the Bursar undertaking key activities.
- Analysis of the Bursar's job description, any key objectives and previous appraisals.
- Analysis of interview and questionnaire responses to establish key threads and patterns.

Interviewees may include, for example:

- The Chair of Governors
  - The Chair of the Finance Committee
  - The Head
  - The Deputy Head
  - Accountant
  - Bursar's secretary
  - Maintenance Manager
  - Groundsman
  - Parent(s) (e.g. Chair of PTA)
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- Preparation of a first draft report to be discussed with the Bursar.
  - The final report will include up to five agreed professional/personal development targets.