

COTSWOLD COMMUNITY

WORKING NOTE NO. 10

by

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An Exploration of the Bursar's Functions and Responsibilities

Introduction

I paid a visit to the Cotswold community on 18th and 19th April, 1974, with the special task of exploring with the Bursar and his sister the functions and responsibilities of his department. I saw Richard Balbernie, Bill Douglas, Marjorie Stranger, Laura Crump, Margaret Seymour, Sandra Dorian, Mrs Williams, Harold Bartlett and Ron Webster.

These interviews made it clear that the Bursar's department is large and complex and that its efficient functioning is essential to free the other more directly therapeutic areas to pursue their task effectively and to support that task.

The Main Functions and Responsibilities of the Bursar's Department

I will attempt firstly to describe the functions and responsibilities of the department. I am not sure I have an absolutely full account but think I can cover most of the main responsibilities. These fall into three main areas as follows:-

(i) Maintenance of all Buildings and equipment

This includes all routine maintenance, e.g. certain regular vehicle checks, regular checks on the swimming pool and equipment, boilers, sewers, oil tanks. It includes also a considerable amount of emergency repair work frequently, although not always, to damage caused by boys. Lastly, it includes a certain amount of ordinary building work such as conversions to boys' houses and staff accommodation.

For this work the Bursar has an establishment for five men – there being at present only three in post. Of those, two, Harold Bartlett is on the building side, Ron Webster on the electrical side, and one, Bill Simmons, on the maintenance of the grounds. The Bursar is in direct charge of these men.

A number of points should be stressed here. The fourth and fifth posts have proved difficult to fill since the grading of the post is such that pay is low and does not attract applications. The present incumbents of the jobs also find this a problem and, at present, feel they can only make an adequate income by undertaking extra duties in the Community. Further, the Bursar finds a need for someone to whom he could delegate control of this area, requiring up-grading of one post to "foreman" level.

Further, it seems clear that the maintenance and repair aspects of this area are best carried out as an internal function to ensure that they are effectively within the Community's own control, thus ensuring regular and prompt attention. One of the men always needs to be on call for emergencies outside normal working hours. Given that they must be there, it is both convenient and necessary that part of their function is a certain amount of general building work. From a therapeutic point of view it is important, too, that these functions be internal to the Community so that the boys are kept in touch with the work, and, in particular, with the effects of damage they cause.

An additional value to the therapeutic task arises from the fact that on occasion the maintenance men may have boys working with them. This is not an easy aspect of their work since, although boys can be useful, they can also be difficult to manage or destructive. It would be extremely difficult for workmen from outside to offer these facilities to boys since they would not be familiar with the problems of the boys, or experiences in their management. It is indeed not always easy to be certain what boys can be assigned even to the Community's own experienced workmen.

An inspectorial function falls into this area also in relation to buildings that are used by specific areas of the therapeutic task, but remain the Bursar's final responsibility – notably the House units. The Bursar carries this function himself (assisted by the Domestic Bursar).

There are frequently problems of priority in this area which are decided at daily and weekly meetings by the Bursar with his staff, or during the day, frequently by the men themselves.

(ii) The Domestic Area

This is again a complex area which covers a number of different functions and responsibilities and has a sizable staff. General responsibility for the area is delegated to the Domestic Bursar who has an Assistant Domestic Bursar who deputises for her when necessary and has certain sub-tasks delegated to her. The Domestic Bursar controls the central kitchens, staff and equipment, and is responsible for general menu planning, more detailed planning being delegated to kitchen staff. Cost control is operated through the accounts department, (see below).

Similarly, she is responsible for the central laundry, staff and equipment, sharing the actual work of routine inspection and control with her assistant.

She is responsible for all the cleaning in the Community. This is complicated. She controls directly the staff who are engaged in cleaning all the buildings in general use in the Community and such as meeting rooms and offices. She is also responsible for single staff accommodation. As regards areas in "specific use" notably House units, she is responsible for assigning staff to them, but once assigned they come managerially under the management of these units. She retains a central function, however, as general adviser and support to these women.

She is responsible for the central stores and shop but delegates the detailed work, for the most part, to her assistant. This is again quite complex, covering supplies to central kitchens, house mothers' weekly orders for food for their Houses, either prepared by the kitchen or supplied direct, direct shopping by boys and staff. Much, but not all, of the accounting work involved is carried out by the central accounts department.

Clothing and furnishings fall partly under the Domestic Bursar's direct control and partly under the control of other staff. She is directly responsible for furnishings in areas in general use and for single staff accommodation. For boy's accommodation she has an inspectorial function as described above and also acts as adviser to house staff who make their own decisions. She prepares the orders for all the clothing and furnishings and she holds one of the five order books in the Community.

Medical and First-Aid supplies come under the Domestic Bursar's control and she, or her assistant, is in attendance in Surgery when the doctor visits.

The Domestic Bursar deputises for the Bursar in his absence.

This is a statement of the present situation in this area. However, it is presently under review since the Domestic Bursar intends to leave the Community within the next few months, and her assistant within the next year. Specifically, the question has been raised and is being investigated, as to whether one professional person, e.g. trained in Institutional Management or Domestic Science, with appropriate secretarial help, would be an effective method of organisation rather than the two professional people as at present?

(iii) Administration, Accounting, Telephone and Secretarial Services

The Bursar has two staff in this area, an assistant administrator and a secretary, and they are assisted from time to time by Richard Balbernie's personal secretary. The division of labour is as follows. Administration, accounting and the operation of the branch telephone exchange are largely the responsibility of one person, Margaret Seymour, (I omitted to find out whether she has an official title). The duties comprise an enormous number of sub-tasks; she prepares returns of all kinds for both internal and external use, e.g. a register of boys, staff sickness returns, staff sleeping-in returns, staff and boy travel. She holds files and forms for new boys.

On the accounting side she keeps internal accounts, e.g. house mothers' provision accounts, pocket money accounts. She controls such accounts as telephone and electricity and single subsistence accounts. She also prepares accounts for boys to be forwarded to Wiltshire and through them to the relevant local authority. She organises wages, sending returns to Wiltshire, collecting the money from the bank and paying out the wages. She prepares and codes invoices. She is also responsible for certain orders and supplies, notably stationery and postage, of which she holds stocks.

She operates the branch telephone exchange, which involves receiving and distributing incoming calls; outgoing calls are automatic.

This role involves holding a multiplicity of relations both within the Community and across the boundary, notably with Wiltshire. Internally no difficulties are reported, but across the boundary things are not so straightforward. The new administrative system is more complex than the previous one with the Rainer Foundation and work has increased. There is more paper work now and also there are more people at Wiltshire than at Rainer with whom relations have to be sustained. This proved difficult at first but is now easing somewhat as Margaret Seymour is getting to know the people at Trowbridge. Also, some difficulty has been experienced in that action and decisions are slower with Wiltshire than with Rainer.

A final point about this role is its internal complexity which demands a considerable capacity for organising and allocating priorities effectively between tasks.

There is no deputy in this role. On the whole preparations can be made in advance when times of absence are known. The secretary deputises in certain tasks, notably telephone and photo-copying and the Bursar can step in himself when necessary. The Bursar also provides general support for this role, the effectiveness of its performance being central to the effectiveness of his own role performance.

A question raised by Margaret Seymour was whether she could not, in fact, help the Domestic Bursar's area by taking over more of the paperwork.

The secretarial role held by Sandra Dorian is also fairly complex and comprises two main sub-tasks; firstly, being personal secretary to the Bursar and secondly, providing general secretarial services to the Community. In some ways the first feels like the "core" of the role, reflecting the kinds of personal loyalties that tend to develop in such a relationship, but the greater time commitment, work load and complexity lies in the second aspect of the role.

The first sub-task includes general secretarial duties, dictation and typing, filing and generally keeping track through keeping check on pending matters and action. She does not deal with the Bursar's appointments or diary, to her regret, since she feels this leads to difficulties in handling outside enquires for him and so on.

More general duties include responsibility for staff documentation, including those relating to selection, joining and resignation. She provides what appears to be a fairly comprehensive typing service to other staff of the Community. The Head of the Polytechnic is the only other staff member who dictates to her, mainly to do with his responsibility for processing boys who are referred. The rest of the work is copy typing from various kinds of material submitted in longhand. This includes letters, case-notes, after-care reports, case-conferences reports, regular need assessments, referrals, intake and admissions, and other things to do with the boys, internal management reports, memos for the Bursar and so on. She also drafts and duplicates internal forms and

catalogues the magazine library. As noted above, she deputises for Margaret Seymour mainly in respect of the telephone exchange. She does this weekly when Margaret Seymour is at the bank to collect the wages and moves in to Margaret Seymour's office to control the telephone when Margaret Seymour is on leave. Again, this is a complex role where the effective assessment of priorities is important. I think there may be some internal inconsistency in the role in terms of level. The secretarial component and the effective assessment of priorities are at a relatively high level, where the copy typing is at a relatively low level and could be done by someone less skilled. Two questions arise for consideration; firstly, how much of the work is really necessary, e.g. is it really necessary to type on-going case notes for files if they are already written in reasonably legible longhand.? If copies were necessary there is a photo-copier available. Secondly, would it not be more efficient for both staff and secretary if more work were put on to a tape rather than written in longhand?

It is in this area of her work that the secretary is assisted by Richard Balbernie's personal secretary, who will undertake some of the copy typing on the relatively rare occasions when she has no work for him. The arrangement seems to work satisfactorily although at times it would help if she could manage the telephone exchange and to use the photo-copier.

Work with regard to referrals, selection, intake, students, staff applications and general work in relation to external agencies is also shared.

General Comments

The Bursar, as described above, is responsible for all these areas and the staff in them to Richard Balbernie. He and some of his staff also undertake from time to time more general Community responsibilities. The Bursar and Domestic Bursar hold the responsibility for signing orders, so between them are responsible for the processing of all orders. One or other of them must always be available therefore.

In addition, both take part in tasks which are shared among senior staff, the others being Richard Balbernie and Mike Jinks, notably the important task of boundary control at all times especially the manning of telephones at times when office staff are off-duty and initiating appropriate action across the boundary when necessary, e.g. when some crisis develops around a boy. This task falls very heavily on these four people and there is a need to investigate whether other senior staff could not share the task, notably a senior head of houses provided with additional effective deputising support in his own house.

The Bursar also has important responsibilities in deputising for Richard Balbernie in his absence although he does not take on the whole of Richard Balbernie's role. I think there are significant different difficulties in this situation, probably internally and certainly externally. Internally, I am not certain that it is fully clarified who takes on what aspects of Richard Balbernie's role in his absence and if they are fully covered. The situation to some extent be clarified in advance for Richard Balbernie's planned absences, but I think

it may be important to have a more general clarification so that things would run smoothly if he had an unplanned absence.

The Bursar's role is not suitable to take on full deputising since, essentially, it is not directly concerned with boys, a close knowledge of whom is necessary for deputising in other aspects of Richard Balbernie's role. In many ways it would, of course, be convenient if there could be one person, but this could only be in the traditional deputy head role, the arguments against which seem to outweigh the arguments in favour. I will return to this later.

However, the absence of a full deputising deputy head does seem to contribute significantly to frictions across the boundary with the local authority. This arises partly because that is the traditional system and the local authority are used to operating it; partly, I think, it may stem from a difficulty in getting clear with them who is responsible for what in Richard Balbernie's absence. I am not sure how much of that difficulty stems from which side. Difficulties have also arisen about how much authority is given to the deputising person to make decisions in Richard Balbernie's absence, again, either internally or externally. A deputy head would probably be felt to have full authority although he would not necessarily take it. A Bursar would probably be felt to have full authority although he would not necessarily take it. A Bursar would probably be perceived as having less authority and would not necessarily be afforded so much authority. I think that it is probably important that full authority be delegated whenever possible and that the Bursar operates with that authority in appropriate areas, at least from inside. Staff deputising in other areas of Richard Balbernie's role would need similar authority and the local authority would need to be clear as to which is which. I do recognise, however, that the local authority may be resistant to accepting and acting on such clarification since to deal with one person is simpler and more familiar.

Before going on to general commentary I will attempt now to set out in diagrammatic form the hierarchical structures and the tasks and responsibilities of the Bursar's department, see Charts I and II.

Conclusions

I return to the point made earlier, i.e. that the Cotswold Community and its therapeutic task requires a fairly large and complicated administrative and service function on whose efficiency and co-operation success in the therapeutic task greatly depends. From the last point stems the question as to whether the task is likely to be more effectively performed if it is clearly differentiated out as a separate system with its own head, i.e. at present the Bursar, or if it is directly subsumed under the general functions of the Head of the Community with the additional work-load for him shared with the Deputy head, also a person professional in the care of boys in trouble.

There are arguments on both sides.

(i) Arguments in Favour of the Head and Bursar Function and Role Split

It seems to me important that the Head of the Community should be outside and above all sub-systems if the total work-load makes this possible, which in the Cotswold Community it clearly does. I think this facilitates the role of the Head and his responsibility for the over-all performance of the primary task. For example, it enables him to hold a more independent position and to balance the contributions and demands of the inter-acting sub-systems more effectively in relation to task than if he is directly responsible for the performance of any one sub-task himself. Holding the balance is no mean task and would be more difficult if he had a direct personal involvement in one sub-task. It is also important that the Head be free on times from such direct detailed involvement as administration implies in order to hold the Community in his mind as a functioning whole and for this he must be free to “reflect” about it. Keeping in touch with “atmosphere” and being able to respond or organise response to it quickly and effectively is an important part of his role, and to carry this out he needs, and must have, the freedom for such concentration on the totality.

Role and task performance seem also significantly linked with the perceived priorities in this role. For the Head of the Community there is no doubt that running the Community is and is perceived as the priority. Other tasks, therefore, may assume lower priority, and unless properly delegated at an effective level, may be neglected or not be well performed. Professional people in the humane professions are not primarily interested in the details of administration.

By contrast, a professional administrator sees this as his role, is interested in it and gets his job satisfaction from it. He needs to have understanding and sympathy for the primary task so that he can administer in a way that supports it, but he need not and probably should not, be directly involved in the care of boys. Professionalism in the administrative field seems to me just as important, though different, from that in the work of caring for boys. Primary involvement in administrative and service tasks is likely to ensure their more effective performance.

Further, the Cotswold Community is a larger and more complex organisation than the typical children’s home, its administration and servicing, therefore, being a larger and more complex task, whose management would seem to make desirable it being headed by a person of authority and status rather than being bits of the job of a number of people. Such differentiation out of relevant sub-tasks, here administration and servicing, also facilitates the effective linking of this with other sub-tasks for the good of the whole. In addition, the internal organisation of the Cotswold Community differs from that of the typical children’s home in terms of the delegation downwards of sub-tasks to bring them as near to boy level as possible. This has been done for therapeutic reasons so that boys can be confronted with them. For example, the fact that houses have their own food budgets enables the house staff to confront boys with the reality of limited budgets and learn to work with them, an important feature of life in the community at large. However, the managerial policy tends to increase the amount of internal administration and make it more complex than in the typically run children’s home.

The very size and complexity of the Cotswold Community and its rapidly changing needs, also seem to require for efficiency that many services should be internal rather than external to ensure immediate and effective action when necessary. The inevitably slower process of going through ordinary local authority channels underlines the need for internal services.

(ii) The Argument against Having a Bursar Instead of a Duty Head

These seem to lie partly in the latter being the more familiar mode of operating with which the local authority is familiar and, therefore, more at ease. A further argument lies in the fact that there are certain real difficulties in there being no Deputy Head who fully takes over the Head's role in the absence, offering a single figure with whom the local authority can relate and who would have full and general authority. One can see this problem, linked with the fact that at present there is not work enough for three men in these combined tasks. Some of the difficulties in the Head/Bursar task-differentiation system in this respect have been discussed above.

It seems to me that taking all the factors into account, the arguments in favour of the Head/Bursar role and task-differentiation outweigh those in favour of the Head/Deputy differentiation. Work remains to be done, however, in establishing the differentiation effectively, especially across the external boundary in working with the local authority to work with the internal system especially in the task of deputising.

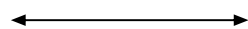
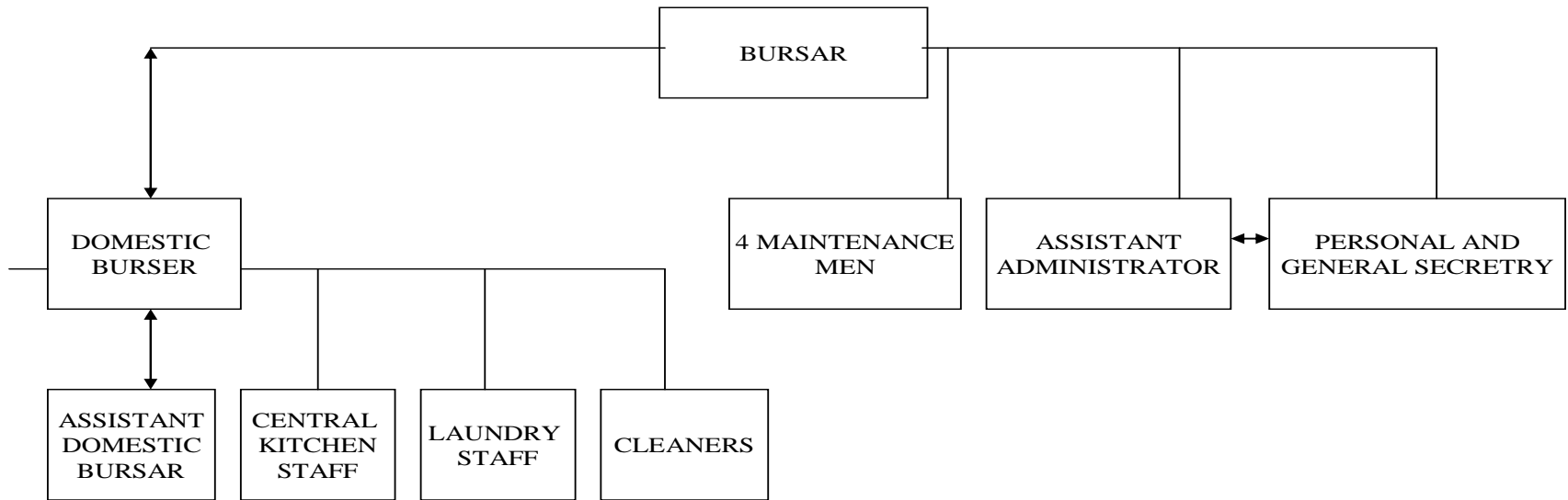
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CHART I

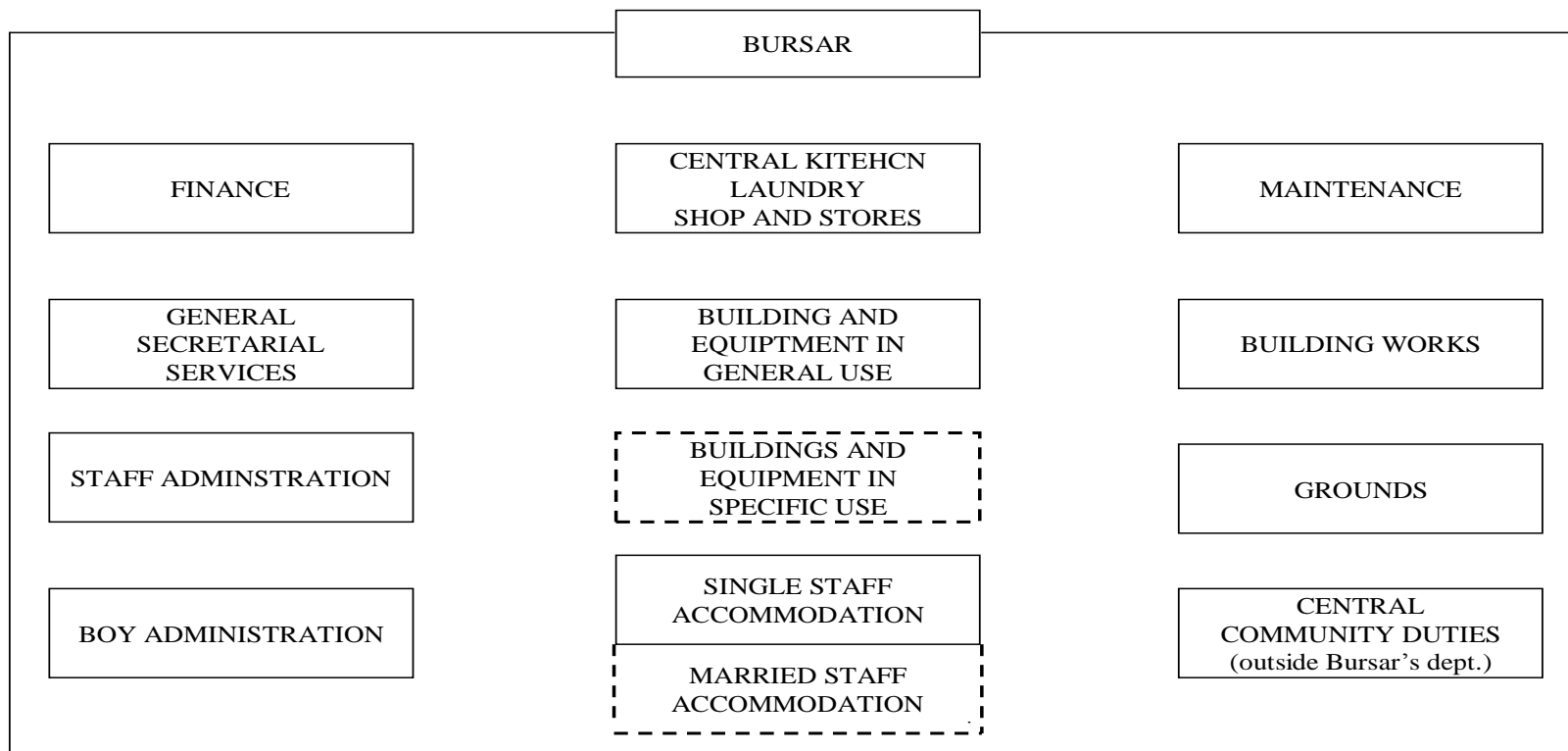
AUTHORITY CHANNELS IN THE BURSAR'S DEPARTMENT

APPENDIX 1



Individuals deputising as well as delegating responsibilities

CHART II TASKS AND RESPONSIBILITIES IN THE BURSAR'S DEPARTMENT APPENDIX 2



————— Direct authority - - - - - Advisory and inspectorial authority

