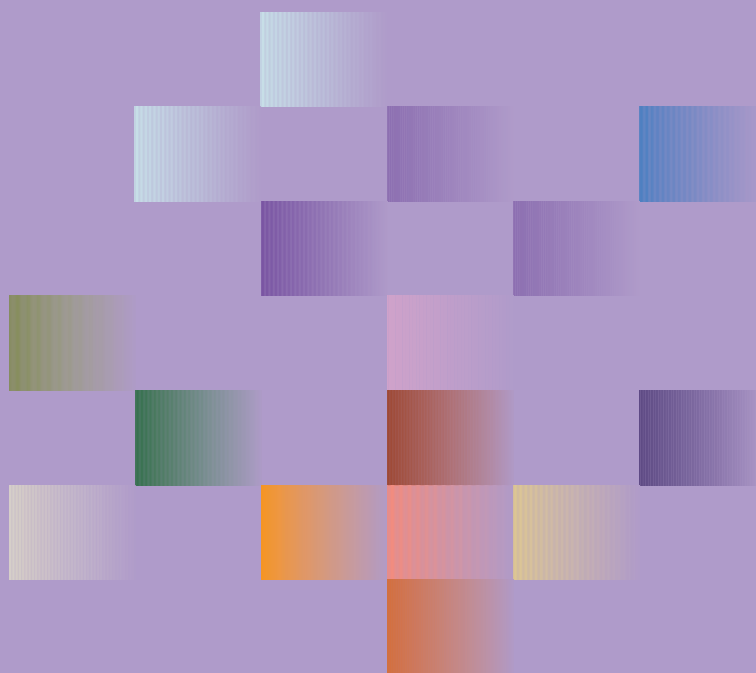


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The baseline study of school business managers

Final Report October 2007



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Glossary

A	administration
A level	advanced level
ASBO International	Association of School Business Officials International
ASCL	Association of School and College Leaders
BA	Bachelor of Arts
BDG	Bursar Development Group
BDP	Bursar Development Programme
BDU	Bursar Development Unit
BTEC	Business & Technology Education Council
CEO	Chief Executive Officer
CfA	Council for Administration
Children's services	Those organisations responsible for delivery of services now under the responsibility of the DCSF
CLAIT	Computer Literacy and Information Technology
COO	Chief Operating Officer
CPA	Certified Public Accountant
CPD	Continuing Professional Development
CSE	Certificate of Secondary Education
CSBM	Certificate of School Business Management
CTC	City Technology College
DCSF	Department for Children, Schools and Families
DfES	Department for Education and Skills
DHT	Deputy Headteacher
DSBM	Diploma of School Business Management
ECDL	European Computer Driving Licence
ECM	Every Child Matters
EdD	Doctorate of Education
FE	Further Education
FMSiS	Financial Management Standard in Schools
FTE	Full-Time Equivalent
GM	Grant-maintained

GCE	General Certificate of Education
GCSE	General Certificate of School Education
HE	Higher Education
HMCI	Her Majesty's Chief Inspector
HNC	Higher National Certificate
HND	Higher National Diploma
HR	Human Resources
HRM	Human Resource Management
HT	Headteacher
IAM	Institute of Administrative Management
ICT	Information and Communication Technology
IiP	Investors in People
ISBA	Independent School Bursars Association
IT	Information Technology
L	Leadership
L & T	Learning and Teaching
LA	Local Authority
LEA	Local Education Authority
LNBA	Licentiate of the National Bursars Association
LRC	Learning Resource Centre
M	Management
MA	Master of Arts
MBA	Masters in Business Administration
MIS	Management Information Services
MMU	Manchester Metropolitan University
MSc	Master of Science
NAHT	National Association of Headteachers
NBA	National Bursars Association
NCSL	National College of School Leadership
NEBOSH	National Examination Board for Occupational Safety and Health
NPQH	National Professional Qualification for Headship

NQF	National Qualification Framework
NVQ	National Vocational Qualification
Ofsted	Office for Standards in Education
ONC	Ordinary National Certificate
OND	Ordinary National Diploma
PhD	Doctor of Philosophy
PLASC	Pupil Level Annual School Census
PRU	Pupil Referral Unit
PwC	PriceWaterhouseCoopers
RAE	Research Assessment Exercise
RSA	Royal Society of Arts
RTA	Regional Training Agency
SBM	School Business Manager
SDP	School Development Plan
SEF	Self-Evaluation Form
SfE	Stands for Education
SLA	Service Level Agreements
SLT	Senior Leadership Team
SMT	Senior Management Team
TDA	Training and Development Agency
TTA	Teacher Training Agency
UK	United Kingdom
VAT	Value Added Tax

Executive summary

A modern school requires modern leaders. Many schools will go through major rebuilding work in the next decade or so. They will become extended schools open to the community far beyond the school day and throughout the holidays. This requires new ways of working and a new approach to leading a school.

(Jim Knight, Minister for Schools, DfES Press Release, 2007)

Introduction

School business management in 2004

1. The 2004 'baseline study of school business management' (NCSL, 2004) was the first commissioned report to provide comprehensive background information on the educational context of the profession, the role and responsibilities, status and relationship issues, professional development initiatives and how school business management might evolve.
2. In 2004, when the original baseline study was published, schools and their business managers were responding to the national agreement on school workforce reform signed in 2002, and the Cutting Burdens initiative. These developments transformed the ways in which information and communication technology (ICT) was used and increased the numbers of support staff operating in schools and the roles that they were performing.
3. The Department for Education and Skills (DfES) had just begun to raise the profile of school business managers. Information about the role had been made available to headteachers and governors, on the Teachernet and Governornet websites and the first edition of the document, 'Looking for a Bursar' had been published (DfES, 2003).
4. In addition, a major national training initiative had recently been introduced. The Certificate of School Business Management (CSBM), designed to train novice and unskilled business managers, had been launched on 21 February 2002 and by 2004 NCSL had organised nationwide provision. The success of the programme and requests for advanced training had also resulted in the development of the Diploma in School Business Management (DSBM), which was first piloted in 2003 to address management and leadership development for school business managers.

Commissioning of this report

5. The initiatives described above were in response to intensive, and at times, radical developments occurring within the education sector over the past twenty years. These initiatives had focused on curriculum development; rethinking learning and teaching in a modern environment which is partly virtual; developing a wider workforce; site-based resourcing; and measuring and reporting standards. This programme of change shows no sign of slowing down, as the Prime Minister's forward in the Education White Paper of 2005 indicates:

We are at an historic turning point: we now have an education system that is largely good, after eight years of investment and reform...Now with the best teaching force and the best school leadership ever, we are poised to become world class if we have the courage and vision to reform and invest further and put the parent and pupil at the centre of the system. (Tony Blair, DfES, 2005: 1)

6. In 2006, a further baseline study was commissioned to:
 - Assess the extent of any changes in the role of school business managers since the baseline study of 2003–4.
 - Explore how school business management is currently carried out in schools.
 - Consider how this data might inform future thinking.

7. This second baseline study addresses the following objectives:
 - To explore and clarify the policy context and research requirements of the study.
 - To gather and analyse data on the numbers, distribution, characteristics, role, levels of operation, relationships, responsibilities, knowledge and attributes of school business managers.
 - To investigate the impact of national policy on the school business management function.
 - To explore factors influencing the effectiveness of school business managers.
 - To explore alternative deployment strategies for the school business management function.
 - To investigate school business managers' training and development needs.

Key findings

Professional environment

8. Initiatives that schools are addressing in 2007 require a fundamental change in approach in response to the rise in the knowledge economy. The current environment parallels the change in thinking needed in 1988 when the Education Reform Act introduced local management of schools. Current initiatives include:
 - The radical development of an integrated approach to Children's Services (Children's workforce strategy, extended schools, collaboration, welfare).
 - The development of a flexible and modern curriculum that meets the individual needs of each child and young person (14–19 provision, intelligent use of staff and ICT, sixth form provision).
 - The improvement of the environmental context for children and young people (Building Schools for the Future, healthy eating, eco-friendly, sustainable development).

9. In conjunction with these initiatives, there is also concern about the ageing teaching profession and the reluctance of teachers to apply for headship roles that is resulting in a search for sustainable leadership approaches in schools.
10. These developments have major resource implications for schools, in terms of finance, staffing and facilities and have prompted proposals for wide changes in how schools are to be resourced, including:
 - Different approaches to school funding that include: community, foundation, specialist and trust schools; city technology colleges and academies.
 - Schools choosing specialisms based on community needs.
 - Integrating special schools into mainstream education.
 - The development of modern leadership teams.
 - The recruitment to headship and the support of headteachers in schools.
 - The contribution of ICT to learning and teaching.
11. These developments require a skilled leader of the resource management function to support the site-based focus and the widening remit of system leadership.
12. School business managers are operating in a turbulent, highly pressured environment where radical changes to Children's Services are prompting new thinking about customer-focused learning, management and leadership roles in schools, and optimal use of resources.

Role

13. The requirement to rethink roles comes at a time when business managers are consolidating their role in schools. They understand that their principal role is to support learning and teaching through the efficient and effective maintenance and effective development of the learning environment. They also suggest that responsibilities are similar for all school business managers across all phases. As with headteachers, it is the size of the school that dictates who and how many people discharge the duties. The role might be generic but how it is interpreted or exploited is context specific.
14. There is confusion over who fulfils the school business management role. This is possibly a result of increasing awareness of the role across the sector. School secretaries, in particular, may have widened their remit but continue to use a title that is inappropriate to the new responsibilities they have adopted.
15. Bursar and school business manager are the preferred titles for 69 per cent of resource managers. Most bursars and school business managers are found in secondary schools. Primary schools favour titles that include finance, administration or office, eg finance officer or office manager.

16. There has been a reduction in the numbers of titles and the percentage of administration titles whilst the numbers of managers and directors are increasing.
17. Finance management has always been a core responsibility for school business managers but the role evolved, in 2000, to include greater involvement in human resource management (HRM). The remit has since widened to include administration and marketing in 2004, and risk management in 2007. There are also indications that responsibility for management information systems (MIS), facilities and support services are becoming central to the role.
18. These additional core responsibilities are increasing the number of activities that business managers need to address.
19. The increase in the number of activities has led to a reduction in core activities from finance, administration, facilities, ICT and MIS management to finance management activities only.
20. Supervision activity has increased in all responsibility areas, apart from MIS.
21. Administrative and clerical levels of operation have reduced since 2000 to time for management and leadership activities. This balance of activity is not reflected in the level of core activities, which remain primarily administrative
22. In smaller schools with limited resources, business managers are absorbing these activities themselves and in times of stress and pressure, are tending to revert to administration and clerical work. Where possible, they employ a part-time clerical officer to discharge some of the administration duties. Although they prioritise leading the school's support staff and working alongside the headteacher and leadership team, they are also beginning to increase the level of management activity.
23. In medium and large schools, the business manager has responsibility for greater numbers of support staff and has an increased supervisory role. They are also active in developing information systems, defining processes and interpreting the rich data available to the school. The role of these business managers has evolved to focus on supporting the learning environment through close co-operation with the leadership team and governors.
24. The role is similar in the largest schools, but there is usually an added layer of middle manager, specialist, support staff who take responsibility for management activities in areas such as premises management, office administration, out-of-classroom supervision and catering. As a consequence, these heads of resources have a higher profile with senior leaders, governors and external stakeholders that includes working with other Children's Services, the local authority, the Training and Development Agency (TDA) and the Department for Children, Schools and Families (DCSF).
25. Effective school business managers understand learning and teaching issues, are aware of developments at the national, local and school level, are proactive in developing and supporting the learning environment and participate regularly in professional development activities.

26. The attitude of the headteacher defines how the business manager's role is recognised in the school. If the relationship is to be successful both have to work at communicating their needs and negotiating their contribution to learning and teaching.
27. School business managers suggest that some headteachers are reluctant to delegate resource management responsibilities because they cannot afford a business manager, they do not want to lose control over an area for which they are accountable for or they lack the knowledge to transfer responsibility.
28. Mutually supportive relationships between headteachers and school business managers are characterised by mutual trust, respect, professionalism, discretion and sensitivity.
29. There is clear evidence that more school business managers are being integrated into leadership and governance activities, contributing a resource management perspective to school improvement.
30. Membership of, or a close working relationship with, the senior management team is one approach which will enable school business managers to understand learning and teaching, and hence tailor the support they can provide. Many primary school business managers express frustration at being excluded from this strategic group.
31. Understanding how to appoint, induct and develop support staff is becoming essential to the role.
32. School business managers' relationships with teachers usually include facilitating teachers' activities, providing information and a pastoral support role.
33. Local authority relationships appear to fall into three categories of: low understanding of the role; support without consultation; and meaningful consultation leading to highly relevant support.
34. Half of school business managers are involved in preparation for Ofsted. The percentage reduces to 39 per cent involvement during and after Ofsted.
35. Networking with other school business managers is important to development of the profession. However, 61 per cent of survey respondents said they seldom or never contact other business managers. CSBM and DSBM participants, however, regularly communicate with each other and share best practice. They are also active in developing and supporting local networks.
36. External to the school, there appear to be sectors that are knowledgeable about the role of school business managers whilst others demonstrate awareness of them but do not consider the increased capacity their role introduces. Inside the school, awareness of the potential of the school business manager role is also variable.

Career

37. The numbers of business managers employed in schools has increased by 21 per cent in the period between 2004 and 2006.
38. 81 per cent of school business managers are female.
39. The percentage of school business managers aged under 35 has fallen from 7 per cent to 2 per cent, whilst the percentage over 56 has increased from 14 per cent to 17 per cent.
40. There is evidence that a career track is emerging. A framework for career progression has been developed over a ten year period based on negotiations amongst stakeholders on the development of the role, and appropriate titles and qualifications at each level. It is divided into three career categories:
 - i. The first three levels suggest an emergent role leading into full school business management. Titles would indicate a junior level of operation. Professional training at this level is likely to specialise in one of the school business management responsibility areas.
 - ii. The three established school business manager levels are characterised by ‘manager’ or ‘director’ titles and high level professional qualifications that progress to business, management and leadership specialisms. These school business managers may also hold the CSBM and/or the DSBM or higher education certificates, foundation degrees or full bachelor’s degrees.
 - iii. Expert school business managers hold titles that recognise both the high level of operation and the breadth of the role; usually encompassing two specialisms. They hold doctoral or masters qualifications, the NBA’s licentiate or other executive diplomas from professional associations.
41. Entry to the profession is via a variety of career backgrounds although 72 per cent of entrants are drawn from four sectors: education, finance, government and industry. Between 2004 and 2007, entry via the finance sector is showing the most significant increase.
42. Recruitment from inside the education sector continues to fall. There are likely to be four contributing factors to this reduction in opportunities for those already working in the education sector:
 - i. **Succession planning in small schools:** The large numbers of small primary schools with school business managers are unlikely to have funds to employ junior office staff who can grow into the role.

- ii. **Strategic-level development:** Larger schools employ specialist staff with single responsibility skills such as accountancy or facilities management. These staff would require further training in the broader aspects of the role before they could transfer to school business management.
 - iii. **CPD provision:** The demand for training for those within the sector who need to understand how to operate at management and leadership level across the increasing number of core responsibility areas cannot be met.
 - iv. **Loyalty to their own individual school:** Most primary school business managers who could step into secondary school roles remain loyal to their schools and do not seek promotion across the sectors.
43. Some expert school business managers are setting up their own businesses as consultant business managers or trainers.
 44. Average salaries have risen faster than inflation. This is possibly as a result of improved professional and academic training or in response to the increasing value being placed on school business managers and the experience they bring to the role.
 45. Salary levels are being held back and even reducing in some schools as a result of local authority or external consultants' misunderstanding of the executive significance of the role as they implement common contracts and national pay-scales. This intervention is currently the most talked about issue for school business managers and is unhelpful in that it is de-motivating a profession committed to supporting school improvement.
 46. Data from the 2004 survey suggested a two-tier profession with men being paid more, holding higher status titles and holding better qualifications. In 2007, whilst men continue to work in high status roles, women are closing the gap as they improve their qualifications, demonstrate their professionalism and argue for titles that represent their new roles.
 47. The best school business managers are not characterised by their gender but by their professionalism.
 48. The ability of female school business managers to increase their salaries and change their job titles is likely to be the result of outside intervention such as an increase in training opportunities, of which NCSL's Bursar Development Programmes are possibly the most significant.

Training

49. In 2007, there is still no minimum qualification level requirement to become a school business manager, nor are there any nationally recognised standards.
50. Even so, there is a shift in the minimum qualifications held by school business managers. In 2000, 52 per cent had gained their highest qualification at school. This percentage had risen to 55 per cent in 2004. The percentage has now fallen to 38 per cent with 32 per cent holding further education level qualifications as opposed to 18 per cent in 2004. The numbers holding bachelors and masters degrees have remained constant between 2004 and 2007.

51. There has been an increase in the number of higher education institutions providing graduate and post-graduate academic programmes for school business managers.
52. In 2000 and 2004, financial qualifications comprised the largest single percentage of professional qualifications, followed by secretarial qualifications. In 2007, financial qualifications still comprise the highest percentage of qualifications, but secretarial qualifications have fallen behind the CSBM, administration and business. These five groupings now account for 75 per cent of professional qualifications. School business management qualifications are now held by 23 per cent of business managers, in contrast to 5 per cent in 2004.
53. Training and support is provided by local authorities but it is usually highly functional and respondents report that it is both patchy and not consistent in terms of quality.
54. Developments in the responsibilities covered by school business managers require a refocusing of management, interpersonal and system leadership skills.
55. There is evidence of an increase in school business management induction programmes although there is no formal network of mentoring support such as that available to headteachers.
56. The provision of specific school business manager professional development qualifications and programmes is largely restricted to the highly successful NCSL Bursar Development Programme although small-scale programmes are offered by the NBA and independent providers.
57. There has been an increase in the provision of academic programmes for school business managers.
58. The adoption of a portfolio approach to modules within all NCSL programmes would support the development of competent school business managers to an expert level of operation.
59. There are limited opportunities for school business managers to participate in more generic leadership training and qualifications to develop consultant business management leaders who can work with schools and support school business management training programmes.
60. Many expert school business managers, who are looking for further development opportunities, are uncertain about the next stage of their development. Some are taking, or have completed, the National Professional Qualification for Headteachers (NPQH) and could provide one solution to the sustainable leadership issues raised in the PricewaterhouseCoopers Report (2007) either as heads in their own right or in shared headships.

The future for SBMs

61. This baseline study has identified a growing maturity of both the profession of school business management and the professionalism of school business managers and there is no doubt that the school business manager role has now 'arrived' as part of the middle and senior leadership in schools.
62. The school business manager role has evolved over the last ten years during a period when education has been a priority for policy makers. Education may still remain a priority but there are increasing pressures to reprioritise. Also, funding for schools cannot be expected to continue to increase, indefinitely, above the rate of inflation. As a result, alternative roles could develop in response to the need to optimise resources and to find new approaches to school leadership.

Optimal utilisation of resources:

- Collaboration of school business managers within local networks.
- Federated schools employing a 'super' business manager to work alongside a 'super' head. These business managers would work with managers in each school who may have different specialisms to offer to the federation as well as a general responsibility in their own school, increasing access to a wider range of expertise.
- Consultant school business managers working with schools in difficult circumstances to build capacity and realign resources.
- The employment, on short-term contracts, of school business managers to deliver specific targets such as project manage a new build or act as a locum for business managers on annual or illness leave.

Sustainable leadership:

- Shared headship between a teacher-leader and resource manager in a job-share role.
 - Potentially, business managers operating as the school's senior leader supported by curriculum and pastoral leaders.
63. School business managers are largely unaware of this need for a second paradigm shift in their role. Consultation would raise awareness and could 'surface' evidence of successful solutions already operating in individual schools that may have a wider application.
 64. The reform of the education department into the Department for Children, Schools and Families (DCSF) consolidates the implementation of the Every Child Matters (ECM) and extended schools agendas. This will require school business managers to work with a wider range of children's services professionals that have their own support and business management staff.
 65. There is, at the same time, both a coalescence of the business role and function across children's services and widening diversity from site to site.

66. These new models for children's services' provision along with an increased diversity of school type could lead to a greater understanding of the generic responsibilities of public service business managers as well as a respect for the specialist functions in individual contexts. Alternatively, these new structures could de-stabilise the developing consensus in specific parts of children's services and lead to disputes over management and leadership responsibility (turf wars among professional groups and between professions and business managers).
67. To some extent it is to be expected that structural changes, particularly those as wide ranging as ECM, extended schools and the new DCSF, will bring a period of uncertainty and unrest. However, a well trained cadre of business managers experienced in resource leadership in times of turbulent change could take a significant lead in ensuring that each profession is acting in the best interests of the child or young person, supporting them through the inevitable awkwardness of the initial stages of realignment through a strong and well developed strategic vision.
68. As well as the potential unrest caused through structural change, school business managers will need to consolidate and build on the good progress they have made in establishing professional and beneficial relationships with each part of the new children's services landscape. In this landscape, there will be:
- **Agency to agency relationships** under ECM and extended schools.
 - **School to school relationships** with the rise of federations and other groupings of schools (including the independent sector as these schools increasingly have to demonstrate their charitable status and involve themselves more with the local community).
 - **Profession to profession relationships** within a site leadership team (eg business managers, teachers, health workers, welfare and police staff) and
 - **Strategic to operational relationships**, where each different professional group will need to contribute to an overall strategic vision for children's services and work together operationally to achieve the economies of scale and synergy expected by a more coherent approach to the whole provision at the local level.
69. This changing landscape will require more emphasis on human resource leadership across children's services, eg building teams, performance management and developing negotiating, delegating and communication skills. To a great extent, school business managers have been responding successfully to this challenge within schools as a result of workforce reform and so are well placed to deploy such skills in the effective development of good relationships in the new and wider field of children's services.
70. The role and position of school business managers needs to play a key part in the leadership debate as NCSL programmes are redesigned in the light of the structural and relationship changes.

71. Sound accounting and sensible business practices will remain the bedrock of business management development but experienced school business leaders will need to be involved in the redevelopment of NCSL and TDA provision. They will need enhanced career pathways which meld the vocational, professional and academic components into an integrated and coherent provision from induction to consultant leader.
72. Succession planning is a key issue as the teaching profession's average age gets higher and a significant proportion retires. Measures taken should work towards the bigger picture of a self-developing and sustainable profession taking its place alongside the other specialists in providing an excellent integrated support for the learning and development of all our young people.

Recommendations

Evolution of the role

73. Developments in the provision of education are leading to new approaches at a time when school business managers are beginning to feel that they understand their contribution to the learning environment. These new approaches will lead to a re-evaluation of the role and possible paradigm shift in school leadership styles. Recommendations for developments that would support both consolidation of the role for the majority of school business managers and its evolution to a new level of operation include:
 - Facilitate a dialogue amongst key stakeholders about the contribution of the role and how skills that support the wider education and public service environment can be developed.
 - Develop a database of projects that would enable sharing of best practice.
 - Consult with school business managers on new models of leadership.
 - Facilitate joint promotion of the role by the DCSF, TDA, NCSL, local authorities, professional associations and school business managers.
 - Develop strategies for smaller schools to share responsibilities.
 - Develop a pack for headteachers and governors of graduating CSBM and DSBM candidates, summarising the learning and describing how the role could develop as a consequence.
 - Incorporate information on the school business managers' role and the benefits of working with them into development and training programmes of other middle and senior leaders.
 - Recruit and train school business managers to Her Majesty's Inspectorate to report on effective school resource management.

Management of relationships.

74. A significant number of school business managers are not being deployed in a manner that makes best use of their skills. A continued dialogue amongst key stakeholders, about the contribution of this role and how it can be promoted, would benefit both the profession and those who work closely with them. Recommendations include:
- Improve school business managers' working relationships with local authorities by promoting the role, facilitating and developing consultation, and possibly developing internship opportunities for local authority staff so they can experience modern school business management practice.
 - Provide governors with information about effective school business management and how business managers can support governance.
 - Develop a support staff guide for headteachers that includes the development of delegation skills.
 - Improve communication between the headteacher and the school business manager.
 - Discuss school business management in teacher leadership and management training programmes and work with business managers on how they can support teachers more effectively.

Training and professional development

75. Between 2000 and 2007 there has been an expansion in responsibility areas, levels of operation and stakeholder relationships. Business managers must demonstrate a wide range of skills and a flexible approach to their role to enable them to operate effectively. The greatest impediment, suggested by business managers, is a lack of understanding of their role and how they contribute to raising standards of learning and teaching. To facilitate understanding of the role and increase the capability of school business managers to operate effectively, the following strategies are recommended:
- Provide further management training for key skills, eg project management, report writing, negotiating skills, team development and customer awareness.
 - 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.
 - Develop higher level courses in response to the complexity of the educational environment in which school business managers operate and facilitate access to a consultant leader programme linked to that for headteachers.
 - To cope with the complexity of schools in the future, consider the development of higher level training and facilitate access to modular, just-in-time, dip-in programmes available online, especially for new finance, technical and legal initiatives.

- Re-energise older school business managers by targeting them for training and development, especially as mentors and coaches.
- Provide training on the implications of public policy.
- Provide access for business managers to programmes currently only available to teacher leaders.
- Consider approaches to attracting and training younger school business managers into the profession.
- Develop a mentor network.