

### 3. The school business management role

*What I feel confident about is that my role is supportive to the teaching and learning roles in the school. I contribute to the conversation, offer thoughts and ideas, understand the decisions made and evaluate and cost the processes and resources to achieve the goal. I identify, work with and deploy the specialists required to complete the task to achieve the targets set. My role is not to educate, but to ensure the facilities (resources, equipment and staff) to educate are in place.*

**(Online focus group discussion, 2007)**

- 3.1.** In 2004 the first baseline report stated that there had been little change in how responsibilities were discharged since 2000 and that there was little evidence of school business managers refocusing their role on supporting learning and teaching (Wood et al, 2004). There was some evidence of increased activity in facilities/support services management, administration management and marketing but core activities had remained the same. Women were operating at mainly administration level whilst men were acting as managers. The greatest emphasis was on administration level activities. Governors and senior management teams (SMT's) were reported to be making limited use of their school business managers. Relationships with other school stakeholders were not considered in the 2004 baseline report. This section reports on how school business manager responsibilities, activities, levels of operation and relationships with school stakeholders have developed since 2004. Stakeholders include agencies, local authorities, businesses, communities, other bursars, governors, headteachers, teachers, support staff, parents and pupils.

#### Supporting learning and teaching

- 3.2.** Ask any school business manager about their responsibilities and each will describe priorities dependent on their own school's context. They will all agree, however, that their principal role is to support learning and teaching or to improve the learning environment. Their engagement with learning and teaching might be through direct observation, careful consideration of how their activities impact the school or by encouraging a debate of how their role can support new initiatives (Figure 3.1). Most reflect on their relationship with the headteacher and that they aim to provide the headteacher with the wherewithal to concentrate on leading learning.

Today, I took part in a Humanities Learning Walk and on Friday will take part in Science Learning Walk. To see the teachers doing their stuff was superb, the quality of teaching was outstanding and the rapport they have built up with the pupils is inspiring. This puts our roles in perspective, its all about the Every Child Matters agenda getting the best out of every child through an invigorating learning environment. One of the classrooms today didn't have an interactive white board, this equipment could transform teaching in that classroom, that's where my role comes in, lets get the funding to do that.

The role of the school business manager can enhance the learning environment by ensuring all support tasks are completed efficiently and effectively.

I now have the chance to promote the link between admin and teaching and learning – how the two do actually work together, and that I do not just count dinner money and process orders. Previously new initiatives would take place within school with little or no regard to any knock on effect they may have on the admin staff – now I have my chance to contribute an opinion from the admin perspective before these changes take place.

(Online focus group discussion, 2007)

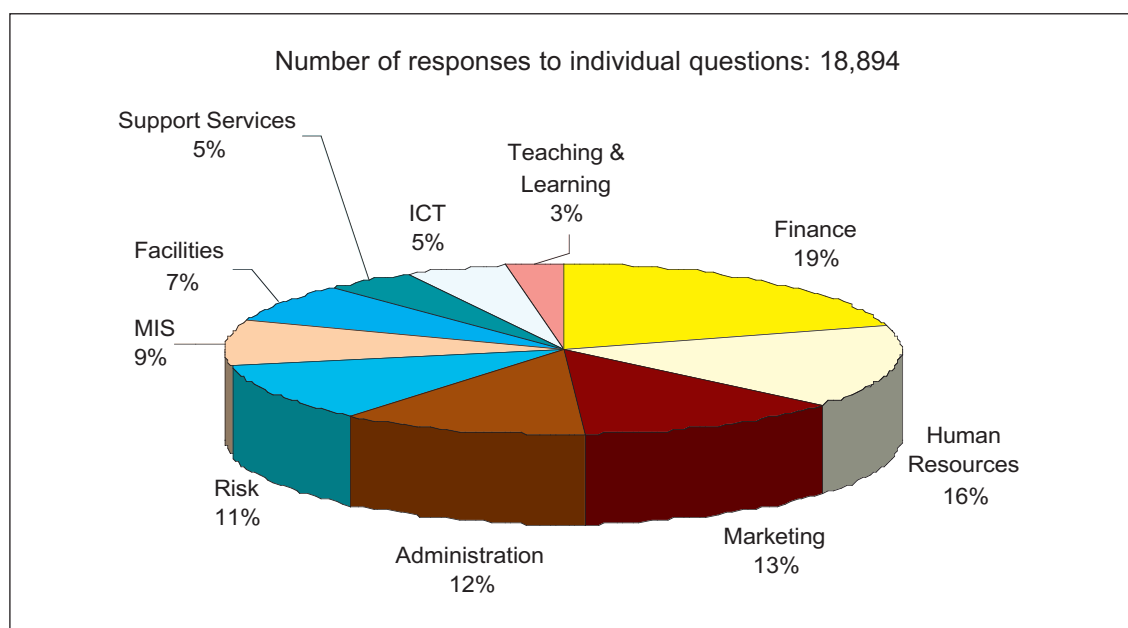
**Figure 3.1: Observations by school business managers on supporting learning and teaching**

## Core responsibilities

*Many of us on the course have different job titles but we are all committed to provide our schools with the administrative/financial support needed to ensure the best for the children in our schools.*

(Online focus group discussion, 2007)

- 3.3.** Although there is discomfort about the use of the term ‘business’ in a school context, each school has a requirement for business activities to be addressed either by staff employed in the school or by buying in services from the local authority or private contractors. School staff carrying out these business activities might be headteachers or deputies, but in many cases are, and should be, school business managers. Either they will be carrying out the responsibilities themselves, supervising others or monitoring and evaluating contractors.
- 3.4.** Chart 3.1 clearly illustrates the various responsibilities of school business management. These include core business elements of finance, human resource and administration management, but also feature marketing, risk management, management information systems (MIS), support services management, facilities management, information and communication technology (ICT) management and learning and teaching. All are specialist areas with their own professional associations.



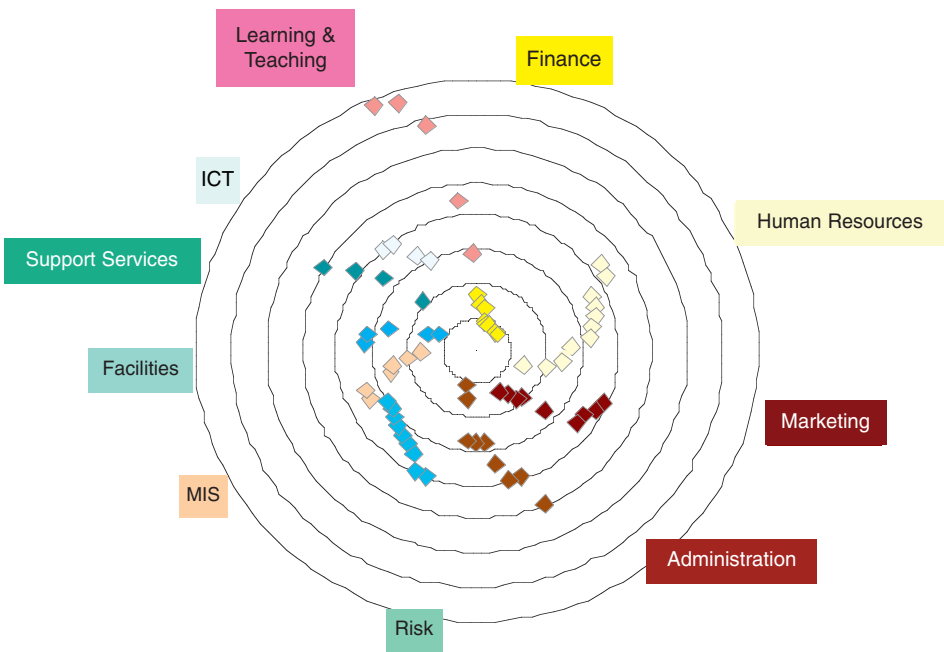
**Chart 3.1: Resource management responsibilities 2007**

**3.5.** Between 2000 and 2007, trends have begun to emerge in the degree of engagement with each responsibility area. For example, although finance management is still the principal responsibility area it now accounts for 19 per cent of activities, having reduced significantly from 26 per cent and 27 per cent in 2004 and 2000 (Table 3.1). This responsibility area, more than any other, is being squeezed in order to make space for increasing activity in other responsibility areas.

Responsibility	2000	2004	2007
Finance	27%	26%	19%
Human resource managment	16%	15%	16%
Marketing	9%	11%	13%
Administration	11%	13%	12%
Risk	7%	7%	11%
Managment information systems	7%	5%	9%
Facilities	8%	10%	7%
Support service	4%	4%	5%
ICT	8%	6%	5%
Learning and teaching	3%	3%	3%

**Table 3.1: Trends in percentage of activity in responsibility areas 2000 – 2007**

- 2007: Number of responses to individual questions: 18,894
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- The radar chart displays the number of responses to individual questions for 12 categories in 2007. The categories are Learning & Teaching, Finance, Human Resources, Marketing, Administration, Risk, MIS, Facilities, Support Services, ICT, and two unlabeled categories. The chart shows varying levels of response across categories, with Finance and Human Resources showing higher response counts than others.



Finance management activities	Activities include keeping accounts, managing the budget and income and developing financial systems and strategies
Human resource management	Activities include managing contracts, remuneration and supply cover. All aspects of support staff management and development and record keeping
Administration management	Activities include keeping, analysing and reporting on records and managing legal, public and statutory matters. PA to the headteacher and monitoring educational trends have been added to this section
Marketing	Activities include maintaining and developing positive relationships with stakeholders
Information management	Activities include managing and developing information systems, record keeping and legal compliance. Participation in strategic management is included here.
Facilities	Activities include planning and building, grounds and equipment maintenance
Support services management	Activities include managing and developing school transport and catering
ICT management	Activities include managing and developing computerised systems
Risk management	Activities are related to the safe and secure operation of all site aspects and disaster recovery planning
Learning & Teaching	Activities are related to learning resources, but include articulating the curriculum philosophy and teaching

**Chart 3.2: Distribution of activities carried out by school business managers 2007**

**3.7.** These changes imply that activities have reduced in one responsibility area, eg finance management in order to make space for increased activity in another, eg risk management, but this is not the case. Chart 3.2 is a representation of how many school business managers responded that they carried out activities within each responsibility area. The largest number of responses appears in the centre. Finance management remains the core responsibility area with almost all school business managers claiming to carry out all activities listed. Activities within all responsibility areas, however, have moved closer to the core signifying that more school business managers are claiming to either carry them out themselves or supervise them. The responsibility areas with activities showing the greatest movement towards the core are ‘marketing’, ‘risk management’ and ‘management information systems’. This movement could be an indication that these responsibility areas are increasing in importance.

Responsibilities	Perform myself	Supervise
Finance management	Manage the budget cycle	Manage cash, investments and credit control (3)  Raise orders and/or process invoices (activity new to 2007 survey)
Human resource management	Keep accurate staff records (2) Manage staff contracts	Keep accurate staff records
Facilities management	Ensure the continuing availability of supplies, services and equipment (3)  Manage planning and/or construction projects (activity new to 2007 survey)	Keep records of equipment furnishings and school maintenance programmes
Support services management	Manage school support contracts	Ensure the adequate and efficient provision of food services (2)  Ensure medical aid is available in the school (activity new to 2007 survey)
Administration	Prepare and produce records and returns (3)  Manage the administrative/clerical and/or other support functions of the school	Maintain pupil records (2)  Provide a reception service (activity new to 2007 survey)
Marketing	Maintain positive relationships among all members of staff	Manage marketing matters (2)  Support development of promotional material (activity new to 2007 survey)
ICT	Develop the school's computerised administration system	Keep records of computer hardware and software
Information systems	Participate in strategic planning	Manage information and communication systems
Risk management	Ensure conformity with health and safety legislation	Ensure the safe maintenance and operation of all buildings
Learning and teaching	Keep accurate records of learning resources and equipment	Keep accurate records of learning resources and equipment

New principle activity for 2007, was the principle activity in 2004, unchanged in 2004 and 2007

**Table 3.2: Main activities performed by SBM's in each responsibility area 2004 and 2007**

**3.8.** Between 2000 and 2004, there was no change in the principal activities, within each responsibility area, performed or supervised by business managers. Between 2004 and 2007, however, there have been changes. Some, but not all, are the result of new activities introduced in response to suggestions made in the 2004 survey. Table 3.2 identifies the principal activities in 2004 and 2007.

Where an activity is no longer the principal activity the new position is indicated, so for example, in finance management, 'managing cash, investments and credit control cycle' is now the third highest recorded supervised activity and has been replaced by 'raise orders and/or process invoices', which is an activity newly introduced to the questionnaire. activities showing the greatest movement towards the core are 'marketing', 'risk management' and 'management information systems'. This movement could be an indication that these responsibility areas are increasing in importance.

Responsibilities	Perform myself 2004	Perform myself 2007	Supervise others 2004	Supervise others 2007
Finance	89%	82%	11%	18%
Marketing	90%	80%	10%	20%
MIS	76%	78%	24%	22%
HR	79%	74%	21%	26%
Risk	69%	61%	31%	39%
Administration	89%	60%	11%	40%
Facilities	58%	55%	42%	45%
Support services	69%	54%	31%	46%
ICT	61%	42%	39%	58%
Learning & Teaching	42%	23%	58%	67%
More than 10% increase in activity		More than 10% decrease in activity		

**Table 3.3: The percentage of activities performed or supervised by SBM's 2004 and 2007**

- 3.9.** The changes indicate that there is an increase in management activity by school business managers and that they are now supervising activities that they used to perform themselves, eg human resource management. This development might be attributable to the CSBM and DSBM programmes which have encouraged greater management activity, both in providing increased management information and in the management of support staff.

Responsibilities	Not My Remit		Admin		Management (Systems)		Management (HR)		Leadership	
	2004	2007	2004	2007	2004	2007	2004	2007	2004	2007
Finance	6	3	17	18	47	50	3	3	27	26
Administration	31	30	23	15	11	17	27	32	8	6
Facilities	34	22	23	25	36	38	3	15	4	0
ICT	39	38	18	13	27	33	0	0	16	16
HR	40	31	16	14	13	14	17	21	14	20
Marketing	40	26	11	22	5	17	10	11	34	24
MIS	41	26	0	23	35	23	0	5	24	23
Risk	46	36	8	5	33	44	7	6	6	9
Support services	46	40	13	19	24	27	17	14	0	0
L&T	76	72	9	9	14	17	0	0	1	2
More than 10% increase in responsibility					More than 10% decrease in responsibility					

**Table 3.4: Analysis of levels of operation within responsibility areas 2004 and 2007**

- 3.10.** In order to determine whether there had been an increase in supervision activity, a comparison was made between the percentage of activities performed or supervised by school business managers in 2004 and 2007. There is evidence of supervision activity increasing across all responsibility areas except MIS, with only a minimal increase for facilities management (Table 3.3). ICT and learning and teaching are the principal responsibility areas where more business managers supervise activities rather than perform them themselves. The core activities carried by school business managers are finance, marketing and MIS.
- 3.11.** A deeper analysis of the survey data explored how many school business managers reported that activities within each responsibility area were not in their remit and the percentage operating at administration, management and leadership levels (Table 3.4). There was a significant percentage drop in those saying that finance, facilities, HR, marketing, MIS, risk and support services activities were not in their remit. Almost all school business managers are responsible for all finance management activities. There have also been significant increases in marketing and MIS, facilities and HR activity.
- 3.12.** When levels of operation are considered, there has been a decrease in administration activity for administration management, ICT, HR and risk management responsibility areas. Each of these responsibility areas records an increase in management activity. HR and risk management also record an increase in leadership activity. Marketing and facilities management both record reduced activity at leadership level. The greatest increase is in systems management activity.



Level of Operation	2000	2004	2007
Administration Functional operator, reactive	60%	33%	31%
Management (systems) Systems specialist, active	27%	27%	29%
Management (HR) Interpersonal facilitator, active		19%	19%
Leadership Leading direction and development, proactive	13%	21%	21%

**Table 3.5: School business managers levels of operation 2000 – 2007**

- 3.13.** The increase in systems management, and decrease in administration activity between 2004 and 2007 indicated in the analysis of responsibility areas is also demonstrated in aggregate calculations (Table 3.5). Between 2000 and 2004 there was a significant decrease in administration level activity and a significant increase in management and leadership activities. There has been little movement, however, between 2004 and 2007. There might be three causes for this apparent consolidation of levels of operation:
- School business managers have developed their role to the point where the balance of level of operation meets the requirements of schools.
  - Recruitment to primary schools is impacting levels of operation, ie they will remain static until the role has become established in primary schools and these new appointments have completed CSBM and, in particular, DSBM training.
  - Further changes will be incremental if there are no further interventions such as the development of a consultant leader programme.
- 3.14.** School business management is a generalist rather than a specialist role which SBM's agree has evolved to support learning and teaching and to develop the learning environment. There are differences in how business managers operate in their schools and each will have their own specialist area as dictated by the school's needs. Nevertheless, there are areas that are core to the role and these are expanding from finance and human resource management to include marketing, administration management and risk management. This increase in activity within responsibility areas is not facilitated by a reduction in responsibilities.

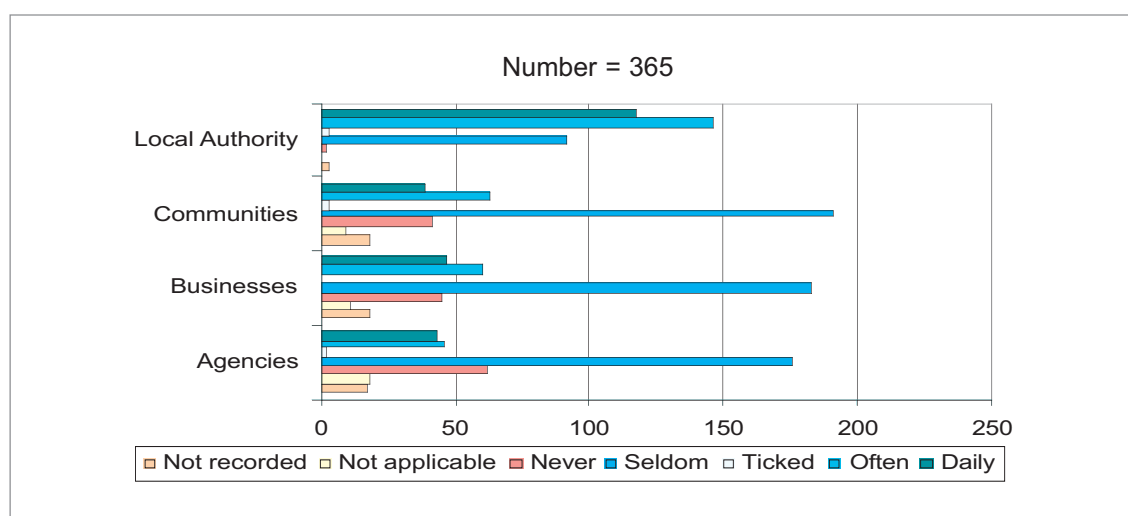
Where possible, the business manager is delegating activities, but in smaller schools, this is not possible and alternative solutions will need to be found if this increase in workload is not to impact their effectiveness. This requirement to delegate responsibilities is evidencing itself in the levels at which school business managers operate. Whereas, administration used to be the main level of activity, there is now evidence of a balance across administration, management (systems), management (HR) and leadership.

## Relationships with key stakeholders

**3.15.** Discussions about the role of the business manager suggest that relationships with stakeholders such as the headteacher, other business managers and NCSL are crucial to enabling effective school business management. Furthermore, the business manager is likely to be the only other adult in the school who interacts with a range of stakeholders as wide as those of the headteacher. The issue for this developing profession is how do they interact with such diverse groups, share understanding of their role and promote their effectiveness.

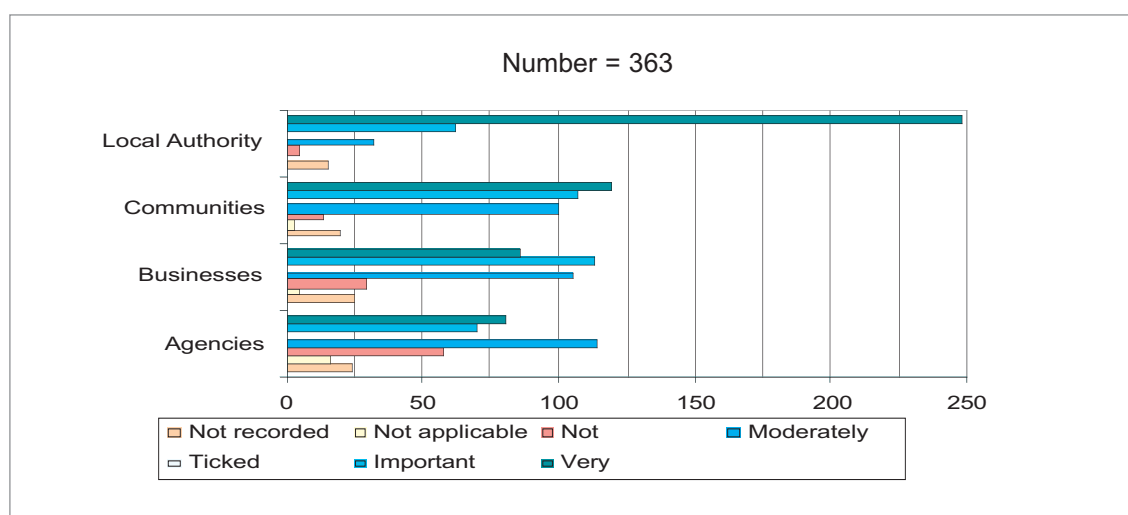
### External relationships

**3.16.** Outside the school, business managers are working with, or responding to government departments, other agencies such as Ofsted, local authorities, businesses and the community. Their closest relationship is with local authorities with 72 per cent claiming either daily or regular contact (Chart 3.3). Only 29 per cent were in daily or regular contact with businesses, 28 per cent with communities and 25 per cent with agencies. Of concern are the 64 per cent who claimed that they were never, or seldom in touch with any of these categories of external stakeholders.



**Chart 3.3: School business managers and external stakeholders 2007**

**3.17.** Responses to queries about the importance of relationships with external stakeholders confirm that school business managers believe their relationship with the local authority is very important (79 per cent) or important (17 per cent). Relationships with communities were also considered to be very important (32 per cent), important (29 per cent) or moderately important (28 per cent). Fewer school business managers, however, thought that their relationship with businesses was very important (24 per cent); nevertheless, 60 per cent thought the relationship was important or moderately important. The relationship with agencies demonstrated the greatest divide of opinion: 22 per cent thought the relationship was very important with 19 per cent saying important and 32 per cent moderately important. Agencies recorded the largest percentage of responses to the 'not important' category at 16 per cent. This variable response to working with agencies is a concern in the light of the Every Child Matters agenda and the movement to working alongside wider children's service providers.



**Chart 3.4 How school business managers would like to work with external stakeholders 2007**

**3.18.** The implication for business managers is that many concentrate their activities purely within the school and most that interact outside the school have developed relationships principally with their local authorities. Those school business managers who study for the CSBM and DSBM, however, are encouraged to explore the support they can get from outside the school and to consider how external stakeholders can contribute to school improvement. This focus inwards is therefore likely to change over the next five years as more business managers complete professional qualifications and as schools extend their services and begin to work with various agencies.

## The Department for Children, Schools and Families and the Training and Development Agency for Schools

- 3.19.** Within relevant divisions of the Department for Children, Schools and Families (DCSF) and the Training and Development Agency for Schools (TDA), which has assumed the remit for support staff, understanding of school business managers and their impact in schools has been increasing. The Bursars Development Group (BDG) formed in 2001, by the Department for Education and Skills (DfES), meets biannually to consider school business managers' roles and their developmental needs. More encouragingly, an expert school business manager is a member of the Implementation Review Unit. Additionally, DCSF Units with responsibilities for school business management areas of operation attend BDG meetings, remain in contact with school business managers either through visits to schools, local authorities or relevant conferences and are clear about the challenges facing them.
- 3.20.** The DCSF supported website: Teachernet, also contains support areas relevant to school business management roles such as:
- information management in schools
  - school finance eg value for money or FMSiS
  - building design, finance and capital
  - staffing and staff development
  - educational procurement
  - annual school census
- 3.21.** Both Teachernet and Governornet contain sections that promote the role and include case studies of effective school business management, whilst the TDA continues to update and publish its explanatory document: 'Looking for a Bursar' (DfES, 2006).
- 3.22.** Despite this core understanding of the contribution of school business managers, many government reports and reviews fail to mention them at all or mention them merely in passing. This is brought into stark relief by the lack of reference to business managers or bursars, despite the inclusion of sections that discuss management and leadership in schools (eg HMCI Annual Report 2006; Implementation Review Unit 2006; Ofsted 2004).

Perhaps direct dialogue with people like the Governors from the DfES/NCSL might help. Something along the lines of: “Congratulations you are the proud owners of a School Business Manager — Please use her wisely and to her full potential.”

There needs to be a national SBM pay structure for all graduates of CSBM and DSBM and a DfES grant to pay for it along the lines of the teachers’ threshold.

Current regulations promote a concept of headship that leaves stakeholders in no doubt that there is only one key decision maker in any school. The DfES is complicit in promulgating this view. Headteachers are held accountable for everything, sign everything and are given exclusive ownership of key documentation. It is surely wrong, for example, that in a school that may employ as many as 200 people only the Head is allowed access to performance review statements, not the Leadership Team member who may have delegated responsibility for staff quality, development and appraisal. Surely this must change.

(Online focus group discussion, 2007)

**Figure 3.2: Observations by SBM’s on supporting learning and teaching**

**3.23.** School business managers clearly acknowledge the support they have received in developing their profession but suggest that the DCSF (DfES at the time of the discussion) could contribute further (Figure 3.2). These suggestions include:

- promoting the role to key school stakeholders
- supporting a business management pay structure
- distributing responsibility and accountability

**3.24.** The DCSF and TDA are key in raising awareness of school business managers and their positive impact on the learning environment. Within both these agencies there are departments that evidence understanding of school business management and are considering their potential impact on and support of government policy. School business managers themselves look to these departments to promote their roles and yet many do not feel that developing these relationships is important (Chart 3.4).

## National College for School Leadership

*From the headteacher's standpoint, having Heather follow the Bursar Development Programme has brought tremendous benefits. Not only has Heather been able to take over some of the head's administrative workload, liberating her to focus on teaching and learning matters, but the knowledge Heather acquired on the programme means she brings a new insight to whole-school issues as well as management ones.*

(NCSL, 2007:29)

- 3.25. At the time of the previous baseline report, in 2004, the Certificate of School Business Management (CSBM) was being rolled out by NCSL and the Diploma of School Business Management (DSBM) was being piloted. These programmes were developed using a detailed framework of responsibilities and skills required of someone administering, managing and leading the school's resources from novice to expert levels. The target 1000th bursar was trained in 2005, a year earlier than pledged, and these popular national training programmes continue to be oversubscribed as a result of high satisfaction rates amongst candidates and the positive impact trained school business managers are having on their schools. The College now has the capability of delivering up to 1,500 certificate places and approximately 300 diploma places across England each year.
- 3.26. There is high awareness of the College, amongst school business managers with 97 per cent of the survey respondents indicating that they had heard of the NCSL. NCSL's website has been developed into a useful resource for school business managers. Case studies demonstrate how CSBM and DSBM graduates contribute to school improvement and support headteachers. talk2learn has become an essential online networking community and school business managers frequently contribute to NCSL in Dialogue on subjects as diverse as new approaches of primary leadership, trust schools and lightening the load for headteachers. NCSL has also developed relationships with equivalent professional groups in South Africa and the United States who are now sharing understanding of the role and who took part in the highly successful first international school business managers' conference which linked simultaneously with all three countries (NCSL, 2007)
- 3.27. School business managers appreciate the support that they have received from NCSL in developing their expertise and view them as a partner in promoting the capacity they could build in schools.

*I think the NCSL should be more proactive in promoting the role and the value of SBMs to head teachers, SMT's and governing bodies in order to assist us in reaching our full potential and make the biggest possible contribution to the schools who employ us. One possible idea is that they could send an information pack to our schools once we have passed our assessment, explaining exactly what we have achieved and the contribution we can make if we are utilised.*

(Online focus group discussion, 2007)

**3.28.** NCSL is significantly impacting the role of the school business manager (NCSL, 2007). It has contributed to the development of a national professional qualifications framework and has facilitated the education of school business managers whose previous highest qualification was obtained at school. Many are now progressing to honours and masters degrees. Case studies, both online and in published documents inform stakeholders of the school business management role and of best practice. Networking opportunities are also available, both online and through conference activity, that support this otherwise isolated, invisible, add-on profession.

## Ofsted

**3.29.** All school business managers come into close contact with Ofsted inspectors during their working lives. Returns from the national survey of school business management indicate that half of school business managers are involved, or very involved, in Ofsted preparations, but the numbers active during and after the inspection reduce to 39 per cent (Table 3.6). Over a third are not involved in discussions about responding to Ofsted requirements after the inspection. Nevertheless, 62 per cent of school business managers indicated that they were interviewed during inspection. Those operating in secondary or special schools were most likely to be interviewed. No survey respondents working in academies had been interviewed, although they had been in post during their Ofsted inspections.

	Not Involved	Slightly involved	Involved	Very involved	Total
Before the inspection	21%	29%	26%	24%	100%
During the inspection	27%	34%	23%	16%	100%
After the inspection	35%	26%	19%	20%	100%

**Table 3.6: School business managers and the inspection process 2007**

**3.30.** Ofsted reports comment on a range of school business management responsibility areas. Principal amongst these are:

- the degree to which finances are managed and targeted at identified needs
- evaluation of the school's performance including monitoring and reporting procedures
- motivation of support staff
- the use of available space

- development of the outdoor environment
- healthy eating
- required legal checks
- the children's safety
- monitoring of health and safety
- risk assessments

**3.31.** An Ofsted inspection is just one of those mechanisms that can be used to evaluate how school business managers operate. It also prompts consideration of effective systems and processes. The introduction of the Financial Management Standard in Schools (FMSiS) will also provide valuable insights into the finance business management process whilst Investors in People (IiP) examines the human resource function. Ofsted, however, is the only agency inspecting the learning environment and as such provides valuable information on how school business managers can effectively support learning and teaching, perhaps the time has come to recruit and train school business managers to Ofsted teams as is done in the independent sector.

### Local authorities

**3.32.** Despite the high proportion of school business managers who indicated that they were in regular contact with their local authorities and who felt the relationship was important (Charts 3.3 and 3.4), recognition of their role by local authorities, is variable. It is often difficult to identify those within the authority who might understand or support their needs and contacts suggested by school business managers are usually finance or personnel staff ranging from clerical support staff to positions such as senior accountants. Nevertheless, almost all school business managers returning the survey said that they access local authority training programmes.

**3.33.** In order to assess services provided for school business managers and their level of visibility to the local authority, all local authority websites were visited and searched, in December 2006, using the word 'bursar'. More than 40 per cent returned no hits. This high percentage might have been due to the multiple titles used for this position and consequently, the term 'school business manager' was searched in a small sample of those authorities that had returned no hits. This approach did not increase the number of returns.



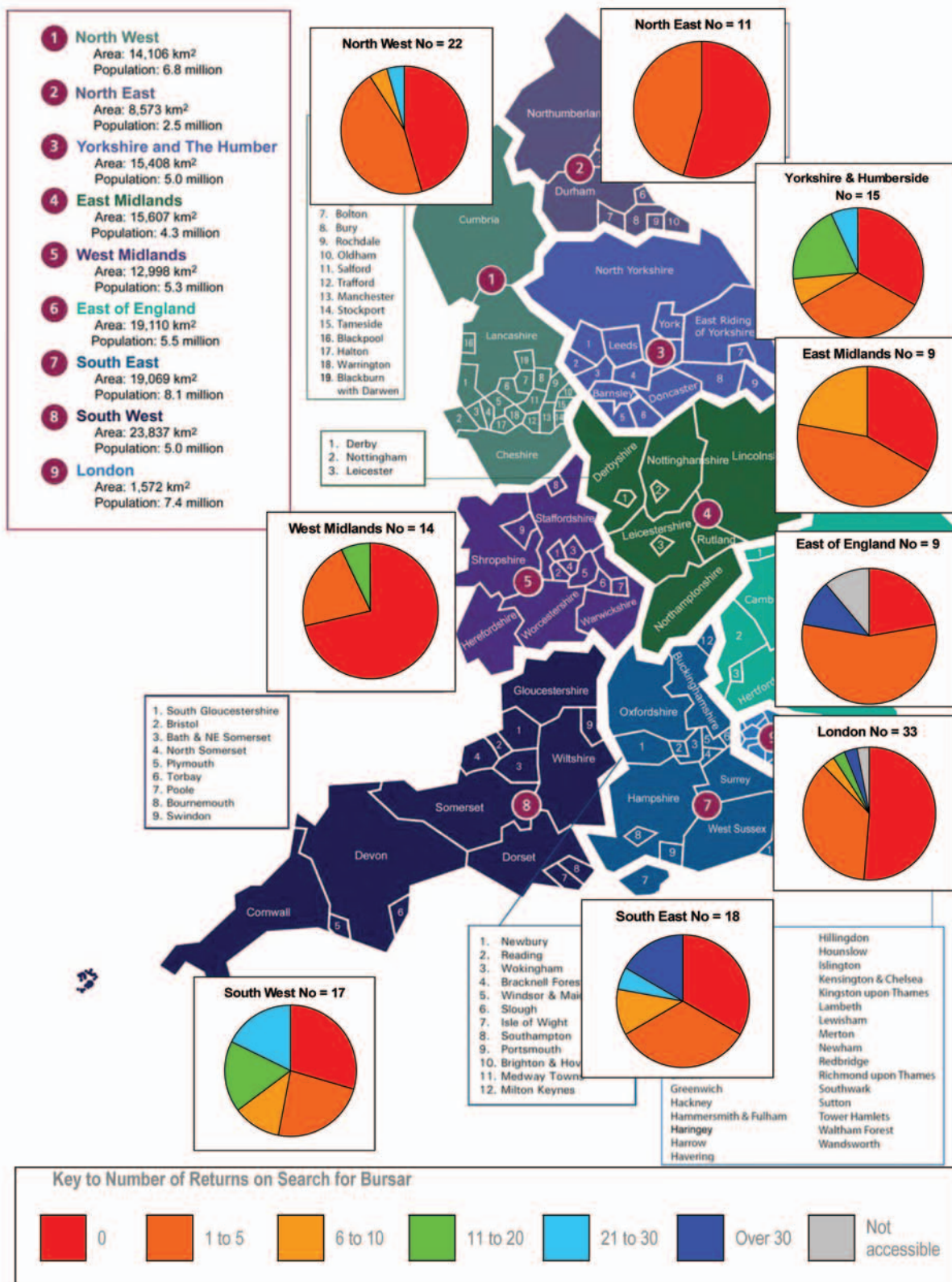


Figure 3.3: Representation of the returns on searching for 'bursar' on LA websites 2006

**3.34.** Figure 3.3 illustrates the number of hits returned for each of the nine regions in England. The North-East and East Midlands appear to provide the lowest level of information or support and the West Midlands returned the greatest number of no hits. Most regions had at least one authority that exemplified best practice. The South-West, South-East and Yorkshire and Humberside returned the highest percentage of these authorities. The most supportive local authorities were located in the East of England, South-East and London.

**3.35.** Fewer than 2 per cent of authorities visibly provided services that recognised the breadth of the role, professional development requirements and the need to inform stakeholders. Examples of services provided include:

**Professional:**

- support of bursars' meetings including bulletins and minutes of meetings
- links to NCSL programmes
- job adverts

**Information:**

- policy documents
- audit reports
- questionnaire responses

**Consultation:**

- consultation documents and feedback

**Support:**

- information about government initiatives
- information and links to support teams (eg finance)
- services for schools
- procedures and systems information

**Raising awareness:**

- information for governors
- newsletters

**3.36.** A bursars' area on an exemplar local authority website included: administration and finance training; news and employment information; training case studies; schools achieving success consultation; schools forum consultation on FMSiS; new funding for 2006-7 information and plans for targeted transitional support grants; an inspection report; newsletters; briefing for NCSL programmes; terms and conditions of employment; information on the building, land and procurement panel; the education policy which suggested sharing bursars in primary schools and the DfES Cutting Burdens document.

**3.37.** Local authorities appear to fall into three categories in respect of their relationship with school business managers.

- **Low understanding of the role:** limited consultation, limited support for the profession. Systems and processes are stipulated and must be adhered to.

*At LA level, at least in our area, there seems to be little awareness of the role. Our schools intranet contains evaluated job descriptions that schools are advised to use – linking in with pay bands. There is a job description for Bursar but I have been advised that this is only for secondary. None of the other job descriptions specifically for primary schools bear any relation to the SBM role. When I entered into a discussion with an HR representative about the subject, I was told that the size of the budget dictates the level.*

*(Online focus group discussion, 2007)*

- **Benevolent:** comprehensive support is provided for the role but without consultation.

*Our LA is aware of the C/DSBM qualifications and we have set up a SBM Group within our Authority that meets each term to discuss various issues and to which we invite different speakers – we are hoping the Head of Education may appear shortly. However, even though the LA recognise this they are currently setting up a new SLA for Finance which will involve monthly visits to check our bank and payroll records and our VAT returns. So, although we are capable, qualified and experienced SBMs (or Bursars, Finance Officers, etc) we are not viewed by our LA of being able to carry out fairly mundane tasks competently! A long way to go I think.*

*(Online focus group discussion, 2007)*

- **High understanding of the role which is shared with key stakeholders:** meaningful consultation, support of the profession both in networking and in the provision of training information. Support is provided for systems and processes if required.

**3.38.** In some cases, local authorities are negotiating with NCSL for the provision of local CSBM programmes. This development, properly managed and supported, could result in a radical shift in the local authority and school business management relationship from 'low' to 'high' understanding. Whilst school business managers appreciate the support their authorities provide, they also voice frustrations (Figure 3.4).

I really do not want to return to secondary schools for a decent pay increase but there may be no option unless I move to another Authority who recognise the value of SBM.

In fact one colleague who has two contracts, one as Bursar and one as Lunchtime Supervisor was being offered the same grade for both! I could get a job working in the local supermarket for the same pay but without the responsibility. They are currently having a rethink.

I feel that my role is very much valued within school but not at a local authority and national level. I am the Admin Officer in a small junior school. Yesterday I was working on a tight budget, while today I was examining the Service Level Agreements on offer from both the LA and the Diocese, discussing the differences with the LA, and writing a report for the governors describing what each had to offer, providing costings and making a recommendation. If that isn't school business management, what is? By doing this I have reduced the Headteacher's workload, allowing him to concentrate on teaching on learning. The LA tell me that the key to being an SBM is a large budget and the number of staff I manage, yet the amount of administration devolved to small primary schools is huge.

I am nearing completion of the CSBM and was supported to do so by my Head and LA who are fully aware of what I will be able to offer in the way of professional support.

(Online focus group discussion, 2007)

#### **Figure 3.4: Observations by SBM's on relationships with the local authority**

- 3.39.** There is a perception that they are not being treated as qualified professionals: "As a whole I do feel neglected: could be viewed as part of the team instead of as a threat taking their role or someone at school told what to do" (Case study interview) This situation is aggravated for primary phase school business managers who feel that their authorities don't understand the role, especially as they differentiate by school income rather than responsibility.

*I feel a valued member of staff in my school and have a supportive Headteacher. It was a battle getting a scale 5 from the Authority even though it had the backing of Governors. If you compare the salaries which Bursars get in primary schools with that of secondary schools it is a joke. We are all doing the same job, albeit on a smaller scale, but the day to day tasks are the same – why should the LA constructively block pay awards and offer inadequate job descriptions for the role we do?*

(Online focus group discussion, 2007)

- 3.40.** The issue that is guaranteed to initiate heated arguments, however, is the local authority's 'interference' in schools' attempts to define the role and use preferred titles.

*More recently is the role of the LA. I am hearing more and more, my own LA included, about almost deliberate attempts to block the high status which Heads and Governors wish to place on their SBMs with the salary to match. We are hearing of some SBMs being addressed as Assistant Heads and I have been in touch with two of these. However, it appears to be the Head and Governors which are using this title but it is not officially recognised by the LAs.*

*(Online focus group discussion, 2007)*

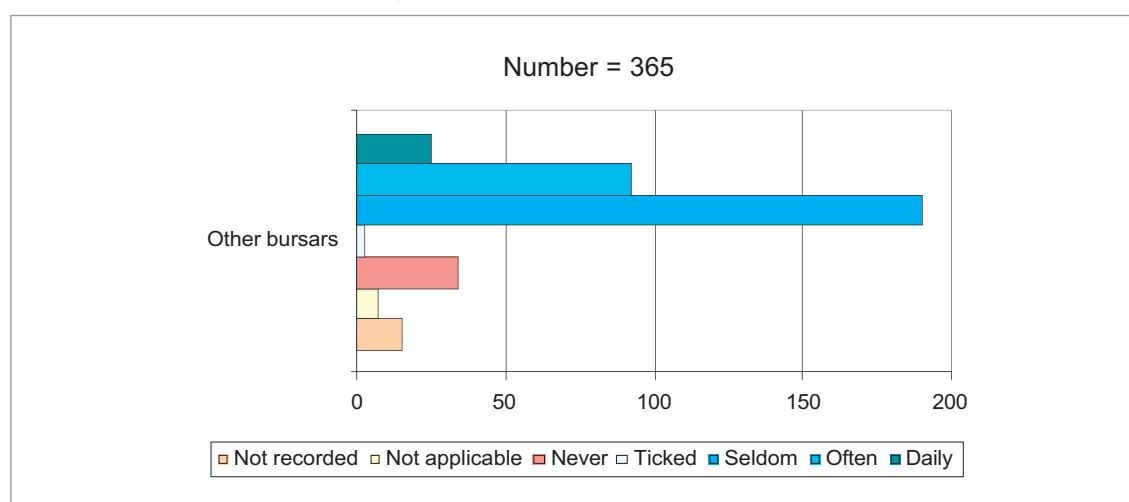
- 3.41.** Despite the frustrations attributed to the variable relationships with their local authorities, some school business managers also recognise that they should be proactive themselves if they want attitudes to change. Those SBMs who begin a dialogue with their local authorities, usually find that there is a change in the relationship that is a benefit to both.

*With regard to the LA take on the role, I feel that no one can promote our roles better than we do ourselves. I set up a SBM termly meeting which included LA finance, audit, LA IT services, LA risk management etc etc. For the first time this year we were included in the official budget consultation, we are invited to attend high level meetings with our headteacher to act as advisors. The profile of the SBM is certainly on the up.*

*(Online focus group discussion, 2007)*

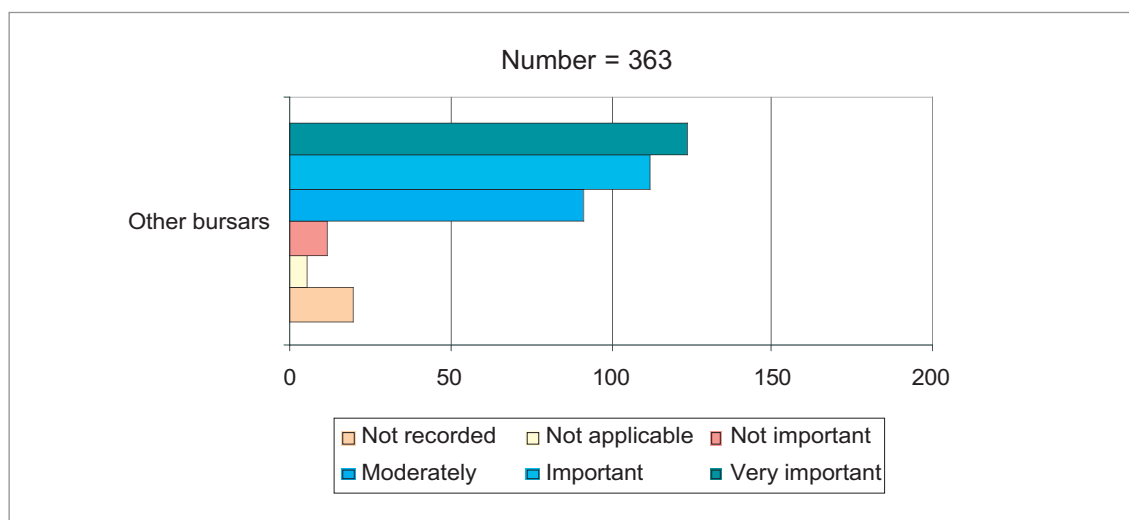
- 3.42.** There are examples of best practice, but most local authorities could provide increased support for school business managers. Most business managers feel that this support should not be in the form of instructions at a clerical level, but should recognise their professional approach to the role. Hence, understanding of the role and the support needed to help business managers operate effectively should be shared with the local authority and then strategies devised to support and promote the role.

## Other school business managers



**Chart 3.5: Relationship with other school business managers 2007**

- 3.43.** As school business management is an evolving profession, dialogue amongst each other is an important element in establishing understanding of the role as one stakeholder suggested: “Are there problems around financial management? Schools bury their heads. How are bursars creating the opportunity to network and get the information they need?” (Stakeholder interviews: 2006) There is also a need to debate and establish eligibility for membership of the profession. Membership of professional associations is not as widespread as it could be (see Section 5). Networking is, therefore, important, particularly as there is usually only one business manager in each school. Despite this need for professional dialogue, 61 per cent of those school business managers who indicated how often they contacted other bursars, replied either ‘never’ or ‘seldom’ (Chart 3.5).
- 3.44.** Nevertheless, school business managers recognise the need to communicate more often as only 28 per cent said they thought that working with ‘other bursars’ was not important or was only moderately important (Chart 3.6). Encouragingly, 34 per cent thought that it was ‘very important’. This need to communicate is evident in the numbers and types of communications on talk2learn and in the numbers of local groups springing up around the country, for example, new academies in London have developed a support network which their finance directors attend regularly and which reports directly to the DCSF



**Chart 3.6: Importance of working with other school business managers 2007**

## Summary

- 3.45.** 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. This oversight was also evident in the literature review where, even if there was awareness of the potential of school business managers, their contribution was almost never considered in generic discussions of management and leadership (Bennett et al, 2003; Butt and Lance, 2005; Gunter et al, 2005; Harris, Brown and Abbott, 2006). There are many possible reasons for this low profile of school business managers. One may be that, as an evolving profession, school business managers and those who work with them are still in the process of developing, understanding and promoting the role (Freidson, 2001). An alternative perspective, suggested by Professor Ron Everett of Illinois, is that school business management is one of those professions that should be invisible if it is carried out expertly, like the oil that keeps machinery running smoothly (Everett, 1996). Nevertheless, 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.

## Internal relationships

- 3.46.** Inside the school, awareness of the potential of the school business manager role is also variable. In many schools, the contribution of school business managers is recognised and they have satisfying and productive roles (Teachernet, 2007). There is, however, evidence of frustration amongst a significant number who are not being deployed in a manner that makes best use of their skills.

*I feel that my skills and considerable experience are underutilised as they could be so useful if I were allowed to use them.*

*Don't feel that my capabilities are utilised, no chance to develop my role, no performance management in place for non-teaching staff. Have recently eased this frustration by becoming involved with job evaluation as a Hay evaluator for this county council (on my days off and school holidays).*

**(School business managers' comments, national survey, 2007)**

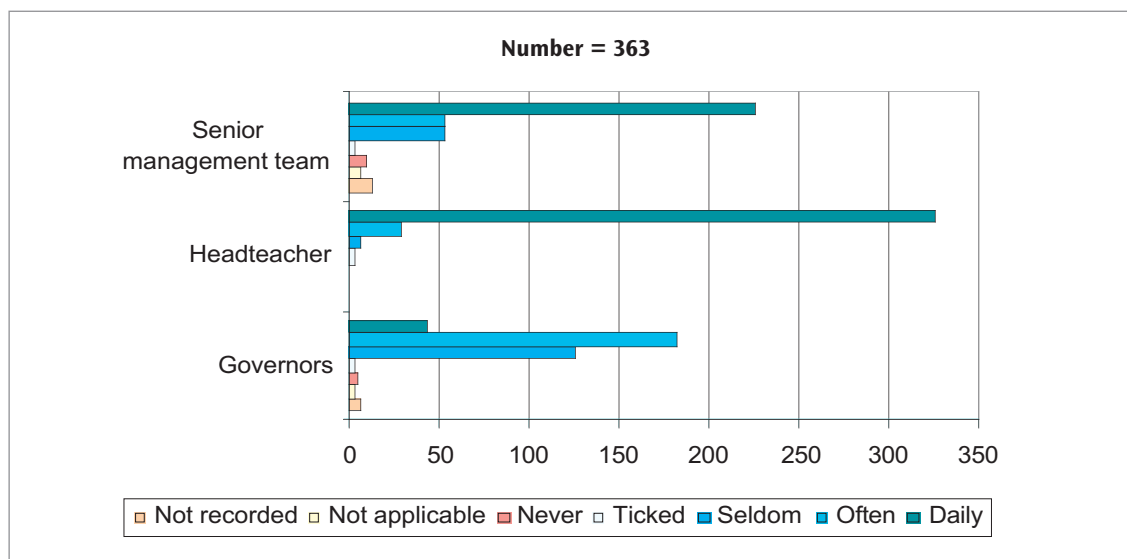
- 3.47.** This frustration may be due to reluctance to share responsibilities.

*I think that in more primary schools the head is the business manager. We have a finance clerk but in no way does she have the responsibility of a bursar or BM...those decisions are with me.(Headteacher's comment, national survey, 2007)*



- 3.48.** Alternatively, the frustration may be the result of limited awareness by heads and governors of how school business managers can be deployed and of the skills fundamental to the role.

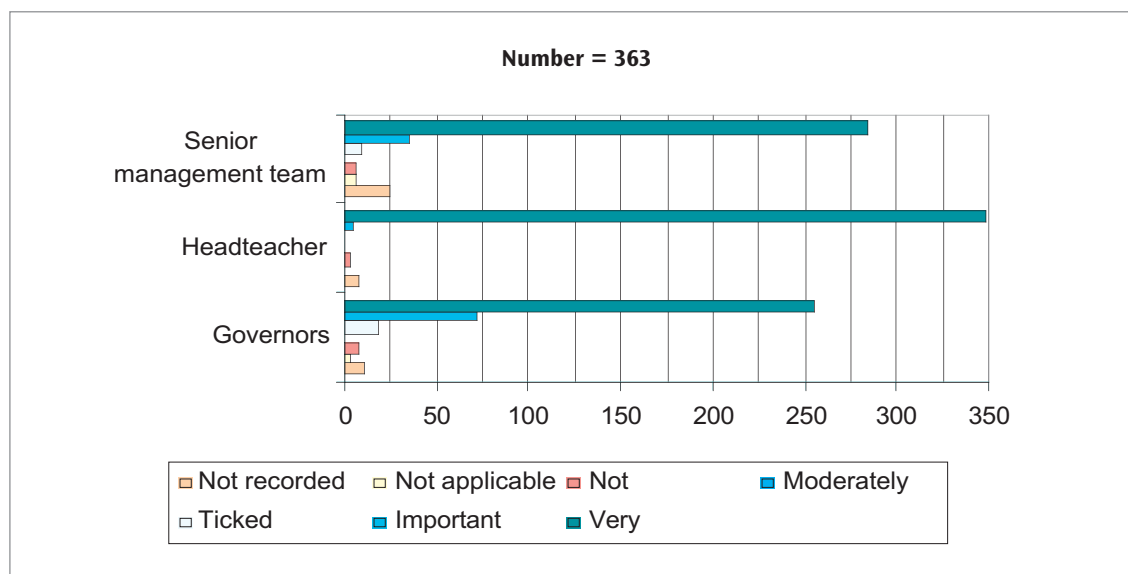
### Governance and leadership in schools



**Chart 3.7: Relationship with governors and school leaders in 2007**

- 3.49.** Increasingly, school business managers are aspiring to a leadership role in the school and actual or potential membership of the SMT is now a prerequisite to taking NCSL's DSBM. Nevertheless, not all business managers are in daily contact with their headteacher (9 per cent) or the leadership team (32 per cent). Fewer business managers are in touch with their governors daily, but we would have expected more than 50 per cent to have said they were often in contact. Of concern are the 36 per cent who claimed that they were never, or seldom, in contact with governors (Chart 3.7).
- 3.50.** School business managers realise that frequent contact with senior leaders and governors is important as demonstrated in Chart 3.8. The relationship with the headteacher is regarded as crucial by most school business managers with 96 per cent saying that it was 'very important'. Less than 1 per cent claimed that it was either 'not important' or 'moderately important'. More than three quarters suggested that working with the senior management team was 'very important' and encouragingly just over 1 per cent thought that the relationship was either 'not important' or 'moderately important'. Although there has always been an indication of a close working relationship between school business managers and governors (Wood et al, 2004) only 70 per cent thought that the relationship was 'very important' with 2 per cent claiming that it was either 'not important' or 'moderately important'.





**Chart 3.8: Importance of working with governors and school leaders 2007**

## Governors

Interaction	2004	2007
Advise	13%	26%
Advise and clerking	15%	6%
Advise and member of committee	16%	16%
Clerk or manage clerking	14%	14%
Clerk or member of committee	6%	2%
Member of committee	14%	8%
Full member	11%	16%
Full member and clerking	1%	1%
No formal relationship	10%	10%
Not Applicable	0	1%
Grand total	100%	100%
Increase in relationship		Decrease in relationship

**Table 3.7: Formal and informal relationship with governing body 2004 – 2007**

**3.51.** Relationships with governors are complex in that they are both formal and informal, and often incorporate more than one role (Table 3.7). For example, 26 per cent of school business managers advise governors, but a further 22 per cent are also either clerks or members of committees. There has also been a reduction in the percentage who advise and clerk, or who are members of committees and clerk, but the percentage of those who clerk or manage clerking only have remained constant. The percentage of school business managers who are members of committees has also fallen. There has been a 100 per cent increase of business managers advising governors and a 50 per cent increase of those who are full governors.

**3.52.** There are business managers who recognise the importance of the relationship and suggest that it should be cultivated.

*Bursars need to work more with governing bodies, not the head governor (Chair of Governors). Need to develop trust. I trained as a clerk to governors and understood their needs. Need training about working with governors.*

**Stakeholder interview, 2006**

**3.53.** Governors also recognise the value of working with business managers who understand school governance.

*We've had a number of away mornings doing governance issues. X's always part of that. There are issues of communication X will address. Understands the role of being a critical friend. Open honest and transparent and part of that culture.*

**(Case study interview, 2007)**

**3.54.** They usually categorise their business managers as friendly and helpful and there are times when headteachers worry that this facilitative approach is being taken advantage of, particularly as governors have little understanding of the increased workload business managers are taking on. The school business managers themselves recognise that governors should also receive training about working with bursars and some provide that input themselves.

*I actually did my presentation (about the SBM role) to the governors as well. I didn't get as good a response as when I presented to the staff. Having said that, they had a long agenda (first in the year). Perhaps it would have been better on another night of the year. They knew they had a long night ahead of them.*

**(Case study interview, 2007)**

**3.55.** Increasing this awareness of the role would not only improve the professional standing of the business manager but would also enable the governing body to understand how business managers support learning and teaching, particularly as the role is viewed by many of them as primarily financial. There are examples of best practice and of school business managers and governors working closely together. The DSBM requires business managers to write reports to governors, but most already fulfil this role.

*Today I was examining the service leader agreements on offer from both the LA and the Diocese, discussing the differences with the LA, and writing a report for Governors describing what each had to offer, providing costings and making a recommendation.*

(Online focus group discussion, 2007)

- 3.56. Others work in project teams with their governors and one business manager reported that a “forward-looking governor” was her mentor for the CSBM.

## Headteacher

*Even though I work in a one form entry primary school there is just so much work to do. My Headteacher came to our school a year ago is really focused on getting the standards of literacy and numeracy raised and therefore hasn't got the time to spend on managing many other aspects of the school. There is only so much work a person can do in one day. If a SBM has the experience of working in a school and understands that working in a school is a unique job, they are ideal to get on with managing all the non-teaching tasks.*

(Online focus group discussion, 2007)

- 3.57. The relationship between the headteacher and business manager is as complex and individual as the business management role is in each school and echoes that of the chief executive and chief operating officer in business organisations (See Section 2). The PricewaterhouseCoopers Independent School Leadership Report (2007) describes headteachers who have a poor work-life balance and as a consequence reduce their teaching commitments and contact time with students. This is a problem particularly in the primary phase. Figure 3.5 describes headteacher roles and given our understanding of the school business manager role, it is clear that there are areas where these SBMs can and do provide support.

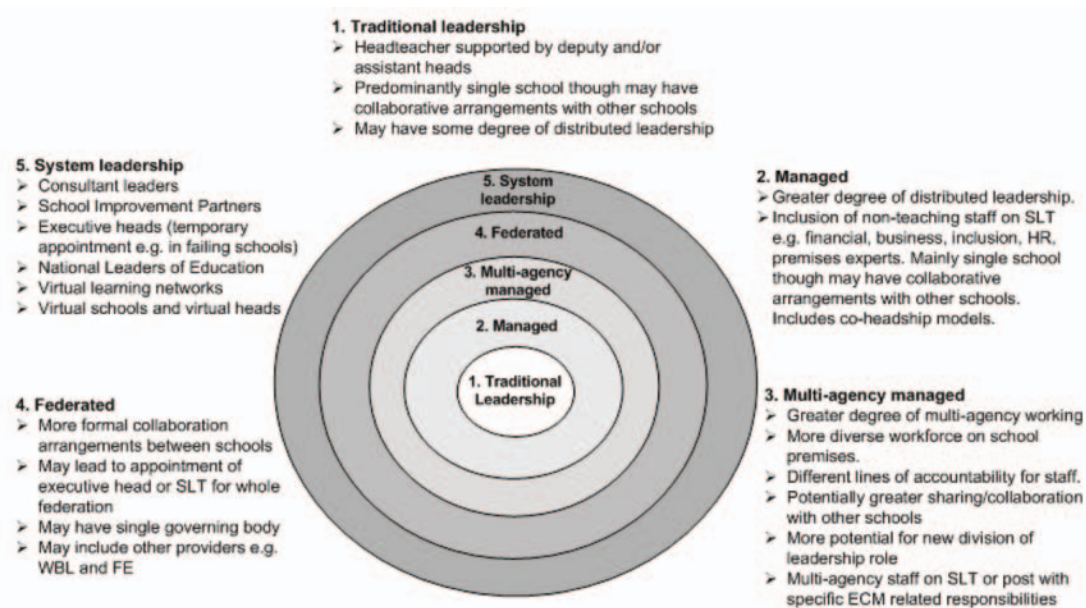


Figure 3.5: Current headteacher roles (PwC, 2007:10)

- **Accountability.** Although the headteacher is accountable for everything, responsibility can be transferred to other staff members. The list of resource management responsibilities described in Figure 3.6 can be carried out by experienced and/or trained school business managers. The principal reasons, suggested in focus group discussions, for headteachers retaining control are:

- i. The cost to the school of increasing the SBM's level of responsibility.

*Most heads would like the luxury of a SBM but simply cannot afford it.*

*(Online focus group discussion, 2007)*

- ii. The heads' reluctance to lose control over an area for which they are accountable.

*Most heads feel the need to retain all responsibility and are very reluctant to delegate to a non teaching member of staff – this is understandable but this should also change with time.*

*(Online focus group discussion, 2007)*

- iii. A lack of knowledge of how to transfer responsibility.

*I believe the main problems faced are not that primary heads want to control everything but that they don't have the time to transfer tasks. This explains why change is often piecemeal. If a head could see how a bursar role could evolve they could plan for change making it a consistent process.*

*(Online focus group discussion, 2007)*

- **Strategy.** Although the head's role may be to provide the vision for the school, the school business manager should be capable of aligning resources to support that vision, thus providing the headteacher with valuable support.

*I also agree with comments about the Head and SBM working closely together, I feel that this is 'horses for courses' and whilst the Head may lead the vision for Teaching and Learning the SBM can ensure that resources are managed successfully to allow that vision to actually happen.*

*(Online focus group discussion, 2007)*

- **Learning and teaching.** School business managers recognise that they are not teachers, but they are clear that they should support learning and teaching and provide capacity for the headteacher to focus on their principal responsibility.

*I shamefully promote the role of School Business Managers and their benefits to free up Headteachers and Senior staff to work on their huge strengths, improving teaching and learning. The role of the School Business Manager can enhance the learning environment by ensuring all support tasks are completed efficiently and effectively.*

*(Online focus group discussion, 2007)*

- **Staffing.** Most school business managers are responsible for support staff in the school and although they take their cue from their headteacher they too must motivate, inspire and develop their staff whilst aligning their approach with government policies.

*Leading support staff issues. Within that there's workforce reform and remodelling and extended service provision interwoven in the role.*

*(Case study interview, headteacher discussing the business manager's role, 2007)*

Some headteachers, however, retain direct line management of support staff, thus needlessly adding to their own work-load.

- **Networking.** Relationships outside the school are extending and working with other public service providers is becoming the norm for headteachers. They are only able to spend more time networking if they can rely on their staff in the school. The school business manager, as part of the SMT can provide appropriate support when the headteacher is out of the school, but will also need the opportunity to develop their own networks with other public service business managers.
- **Operations.** The headteacher's comment about unblocking the loos (Figure 3.5) echoes comments that are regularly made by school business managers, who also feel that they are constantly on call to do the jobs no one else wants to do. This is an area where dialogue between the headteacher and school business manager would establish responsibilities and therefore remove these urgent activities to the remit of appropriate staff in the school.

- 3.58.** Many headteachers have already transferred responsibility for resource management to mitigate the overload resulting from government policy and initiatives, particularly the Every Child Matters agenda (DfES, 2004). For those who have not yet renegotiated roles, there are suggestions from business managers who have a successful working relationship with their headteacher, of how to develop a mutually supportive role (Figure 3.6). They list mutual trust, respect, professionalism, discretion and sensitivity as essential.

The Headteacher and I work very closely together, and are an effective team. For that to happen there must be mutual trust and professional respect.

The headteacher and SBM should work closely as critical friends. This is achieved through professionalism which engenders mutual trust.

I firmly believe the synergistic approach is one to be worked towards and one that will eventually become the norm involving the development of mutual trust and respect between two professionals each bringing their own particular expertise to the job in hand.

I think discretion and sensitivity play a large part in our role – understanding a Headteacher's strengths, and being prepared to take responsibility for areas he/she is not so happy with, and always being conscious not to undermine them.

As the years went on, we knew almost by osmosis which tasks I could relieve her of, and which her strengths played to.

(Online focus group discussion, 2007)

**Figure 3.6: Characteristics required to work synergistically with headteachers**

- 3.59.** Headteachers and business managers who work well together understand each other's roles and provide mutual support based on communication and negotiation until a synergy is achieved. Nevertheless, there is a lack of clarity about the school business manager's role across the national programmes; such if improved would facilitate this understanding (Figure 3.7).

I think one way forward would be to inform those currently studying for the NPQH about the SBM courses and ranges of study. After all, these are the Headteachers of the future and the more they are made aware of our studies, the more they may value the help and support we can give to their role as Head.

(Online focus group discussion, 2007)

**Figure 3.7: Promoting the role through training**

- 3.60.** There is a perception that some headteachers are preventing their business managers from operating and developing professionally whilst those whose roles are recognised and utilised by their headteachers use words such as 'fortunate' to describe this recognition. As a result, business managers suggest that it is the SBM's responsibility to promote the role, particularly if their headteacher has little awareness of its possibilities. Strategies included taking headteachers to bursar network meetings, showing them material about the role or working with them to promote the role to others (Figure 3.8).

I think that the key to promoting the role lies in highlighting the effects strategic linked business planning can have on the learning environment and, ultimately, the children.

The LA's Finance Section has recognised the importance of the role for several years and we have 'Bursar Network Meetings' every term which are really helpful. I took my Headteacher to one recently and he was astounded at the amount of information we cover and the scope of knowledge we are expected to have – it was an eye opener for him.

Before I started doing the CSBM course I gave a copy of the booklet about School Bursars to my Headteacher and told him to read it as the information in it could change his life. He did, and is now really keen to have a school bursar (or SBM).

I am currently employed as a SBM in a Primary and am part of the SLT. I am also working with the Head to present to local Primary Heads, via the LA and NAHT, the benefits of SBM's in Primary schools. We both feel strongly that this is a position that is not being utilised to its maximum potential locally or recognised for its impact on Teaching and Learning in school which is, after all, why we are all here.

(Online focus group discussion, 2007)

### Figure 3.8: Promoting the role to headteachers

- 3.61.** The relationship between the headteacher and school business manager is crucial in enabling optimal resource management and support of the learning environment. It is a relationship to be cultivated. Observations, stakeholder interviews and focus group discussions all demonstrated that headteachers and school business managers don't need to have their offices located close to each other (although this helps) but regular communication is crucial. Schools are complex, turbulent environments and the pace of change is not going to slow down. Without communication, therefore, it is difficult to align the headteacher's vision with resources, and the business manager is unable to determine how best to provide the support required by the headteacher. For many business managers, the breakdown of this relationship would prompt them to resign.

*Respect for the individual comes from the head. What would force me to leave the school?  
A head who doesn't respect me.*

(Stakeholder interview, 2006)

**3.62.** School business managers suggest that the key to ensuring a synergistic and supportive relationship is promotion of the role. This should not be left to business managers alone, although they have their part to play. Further proposed strategies include:

- marketing of the role by the DfES, TDA and local authorities
- sharing of case studies of best practice by NCSL
- ensuring that teacher and school business management development programmes, at all levels, discuss this relationship

## Leadership team

*I have since been invited on board the SMT which is quite a revelation really as I didn't think I was previously regarded as a professional among the other members and felt that my contribution to the running of the school was not recognised with any importance, particularly with regard to the SDP. However, I think my head had to justify my presence on board – quite what he did I don't know, but I have quickly begun to feel as if my opinion does now have an impression and seem to have 'important' discussions with members of the SMT which I otherwise would not have been included. I now have the chance to promote the link between admin and teaching and learning – how the two do actually work together, and that I do not just count dinner money and process orders! Previously new initiatives would take place within school with little or no regard to any knock on effect they may have on the admin staff – now I have my chance to contribute an opinion from the admin perspective before these changes take place. This hopefully will address the feelings of unimportance/undervalued I and many others I'm sure experience within school.*

**(Online focus group discussion, 2007)**

**3.63.** For many school business managers, membership of the leadership/senior management team is the goal to which they aspire. Membership is regarded as a formal recognition of their professionalism and as the opportunity they need to understand and contribute to learning and teaching. Some business managers who are members of the leadership team experience a meaningful inclusion in discussions, whilst others find that recognition of their contribution is limited.

*It seems that despite the nature of the school, the SBM role is not completely recognised and although we are invited to join the Senior Management Team, we still feel a little worthless and not taken very seriously. Generally we will always be the office staff or the admin team. There is not a real awareness of the role or the work involved in achieving the title.*

**(Online focus group discussion, 2007)**



Interaction	2004	2007
Advise	17%	9%
Attend when required	18%	10%
Full member	26%	44%
No formal relationship	22%	16%
Member of a planning group	6%	10%
Member of a management group	11%	11%
Grand total	100%	100%
Increase in relationship		Decrease in relationship

**Table 3.8: Interaction with the senior management team 2004 – 2007**

- 3.64.** Between 2000 and 2004 there was very little indication that business managers were working more closely with their leadership teams, but there have been real changes between 2004 and 2007 (Table 3.8). This increased interaction with the SMT could be a result of business managers completing the CSBM, demonstrating increased professionalism or a response to membership being a prerequisite to applying for DSBM. (NCSL, 2007)
- 3.65.** Fewer business managers have no formal relationship with the SMT. Percentages have reduced from 22 per cent to 16 per cent over the three years (Table 3.9). Of the 63 per cent who have a formal relationship, 43 per cent are now full members, thus reducing the percentage who advise the SMT but don't attend meetings or attend only when they are required. To business managers, the benefits to the school are clear (Figure 3.9).

I am in a very fortunate position in that my vision is also the vision of the Head and SMT and the support I receive is outstanding. As part of the core management team, I work closely with the Head and Deputy and find that an enormous benefit. I am able to link my areas of responsibility to other areas of the school to give support.

By including SBM's within the senior leadership team, business management expertise can be applied within an educational context. I don't consider the management of a school to be the sole responsibility of the SBM, yet they can provide valuable contributions to and have a significant impact upon and the success of a school..

(Online focus group discussion, 2007)

**Figure 3.9: Benefits of including the business manager on the senior management team**

- 3.66.** This perception of the importance of aligning the school's resources with learning and teaching is echoed in the Implementation Review Unit's response to the PricewaterhouseCoopers interim report when they discuss the implications of extended schools and the involvement of the wider workforce.

*Support staff sit alongside their teacher colleagues in senior management teams and this is a trend which will increase. The sharp distinctions between function will disappear as more adults other than teachers become involved in the school community as it extends and embraces other public services.*

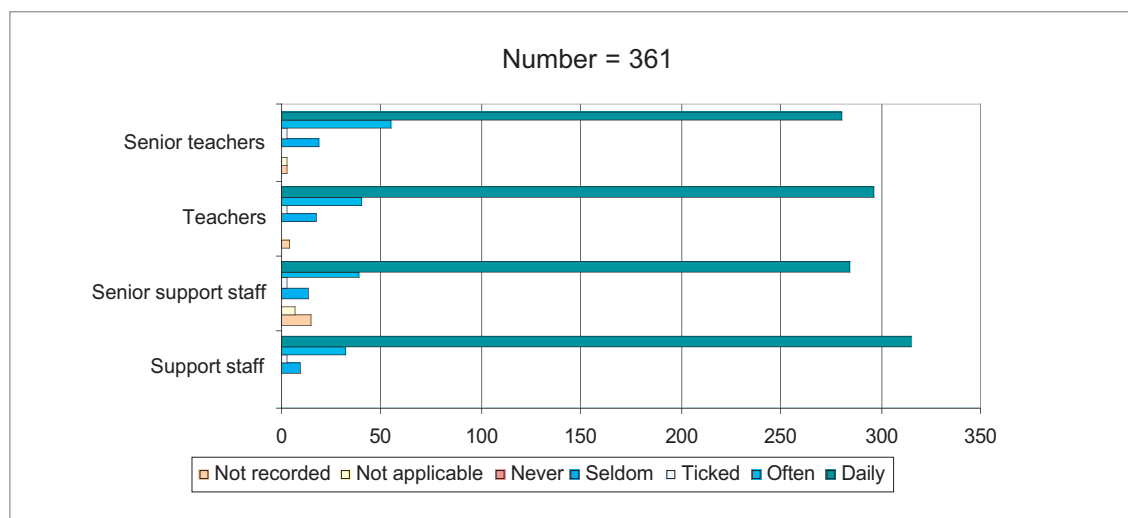
(Implementation Review Unit, 2006)

## Summary

- 3.67.** The last three years have witnessed a shift in the relationship between business managers and the school's governors and leaders. More business managers are included in strategic activities and so are clearer about how they can align resources to learning and teaching. Most secondary phase and some primary phase business managers have productive working relationships with their governors, headteachers and leadership teams, but for many in the primary sector, there is still some way to go. Most of the strategies suggested to improve these relationships are in place, but consideration of how training programmes could incorporate making best use of school business managers has been suggested as a way forward.
- 3.68.** Increasingly, information is being made available, to headteachers and governors, about the role that has evolved into that of the school business manager. Websites on Teachernet and Governornet provide comprehensive information on the benefits of employing a school business manager. The document: 'Looking for a Bursar' (DfES, 2006) provides a modular job description with core, intermediate and advanced functions encompassing finance, human resource, health and safety, information and communication technology (ICT), administration, marketing and facilities management roles. NCSL also promotes the benefits of employing experienced school business managers by sharing case studies of good practice on its website and publishing an annual Impact and Evaluation Report (NCSL, 2007).

## Staff in schools

- 3.69.** It is no surprise that business managers come into contact with support staff more often than with teaching staff (Chart 3.9). Of those that recorded a response to the importance of the relationship, 16 per cent believed that their relationship with support staff was 'important' and 81 per cent thought that it was 'very important' (Chart 3.10). Most business managers are responsible for line managing other support staff in the school, although due to the range of support staff roles they are most likely to be supervising those who have no direct contact with teachers, eg office and facilities staff. The business manager's principal responsibility, in this area, is ensuring that activities they cannot address themselves are covered by appropriately trained support staff who share and understand the vision and values of the school.

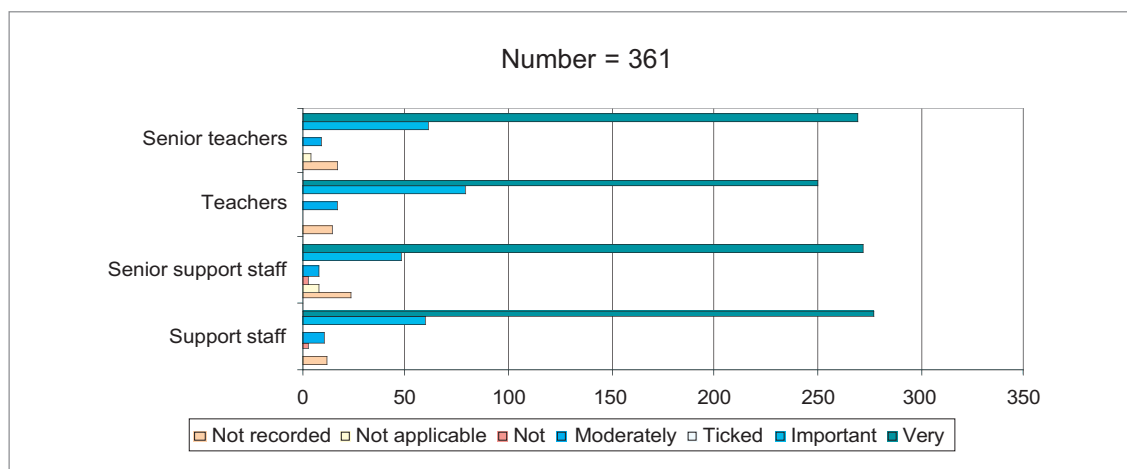


**Chart 3.9: Relationship with the school staff 2007**

**3.70.** In larger schools, there are now senior support staff who supervise within each responsibility area, eg facilities, finance, HR, ICT, learning resources etc. This accountability for the well-being, motivation and development of these staff has resulted in a requirement for SBMs to develop recruitment, induction and performance management policies and procedures. They also need to understand how to develop their teams and have an awareness of training and accreditation opportunities outside the school. Those business managers who work in larger schools and manage increasing numbers of support staff are finding that their role is becoming similar to that of the headteacher and that they have to work hard not to become remote from the staff they manage.

*I also think the relationships may be shifting, in that the bursar may be leading aspects of the school almost in parallel with the head, and there are commonly as many non-teachers reporting to the bursar as there are teachers reporting to the head. Support staff are more diverse and we have in place a layer of middle management within the support staff, (Finance Officer, Network Manager, LRC Manager, Admin Manager, Site and sports centre manager etc), which on the one hand gives me more chance to pursue a strategic role, but on the other creates a range of interfaces which are time-consuming, all the more so if staff are new /underperforming and so on. I am frustrated by the amount of time I have to give to monitoring, meeting, communicating, and frankly repeating myself. I am also in danger of being seen as more remote by support staff in general, because I simply cannot have a meaningful professional relationship with them all. ..*

**(Scoping interview, 2006)**



**Chart 3.10: Importance of relationship with school staff 2007**

**3.71.** Although there was consistency between how often business managers interacted with teachers (Chart 3.9) and how important they thought the relationship was (Chart 3.10), it was also surprising that 11 per cent of business managers thought that it was only 'moderately important' to interact with teachers. When considering the business manager's relationship with teachers, three distinctive modes of interaction have emerged:

- **Facilitator,** This role has developed as a result of workforce reform and encompasses assuming activities that are considered unproductive for teachers.

*I'm not a qualified teacher and take my hat off to those that are – it's a tough job. I do feel, however, that I have a valuable role to play in moving the school forward. We are lucky at our school in that we employ fantastic teachers and I want them in the classroom teaching our students not spending time on support functions.*

*(Online focus group discussion, 2007)*

There are worries, however, that this facilitative role is taken advantage of and so should be managed.

*I still have some fears though, that teaching staff view us as a general dogs body to do anything that they don't feel like doing from the washing up to changing money at the post office.*

*(Online focus group discussion, 2007)*

- **Provider of information:** In particular, those school business managers who attend the DSBM or the honours and masters programmes designed for them have developed an understanding of the importance of providing management information. Most often this is pupil attendance and attainment information or financial budget reports.

Many are negotiating with teachers to understand the information that they need and how it can be presented in a meaningful manner. This is a crucial area for supporting learning and teaching that has the potential for further development.

*...without a doubt one of the things which schools have to get better at is data management, data analysis – they've got loads of data, they're not using it to drive performance and there's a skill-set missing inside the system which is around everything should be driven by financial decisions, everything should be driven by data and evidence and it's just not in the system. Some schools are doing it, admittedly, and they're getting good at doing it but I think it's just nowhere near across twenty-three and a half thousand schools – and that could well be a joint appointment, it could be a business opportunity for somebody. If I was a bursar, I think I'd want to be influencing the performance of the school, not just running the finances and therefore one of my points of contact with this Head of Learning is, in terms of projects, what are the deliverables? Where's the evidence in the process? How do we get the teachers on board? And the customers? All that sort of thing, how do we build the model that builds improving standards?*

*(Scoping interview, 2006)*

- **Pastoral care:** This is an unofficial role that has been observed in primary and secondary phase schools. Headteachers recognise that these pastoral business managers are vulnerable to exploitation as everybody thinks it appropriate to bring them their problems whether they are work or home related.

**3.72.** Despite evidence of good practice in primary and secondary phase schools, there is often misunderstanding of the role that causes resentment on both sides. Teachers feel that funds are being spent on support staff when they could be allocated directly to learning and teaching whilst business managers feel that their contribution is not recognised. This tension could be resolved if the SBM role were to be explained to teachers but school business managers are also usually slow to share with teachers how their role has been evolving and how they can assist in supporting learning and teaching. Where they do take the time, this strategy is usually successful.

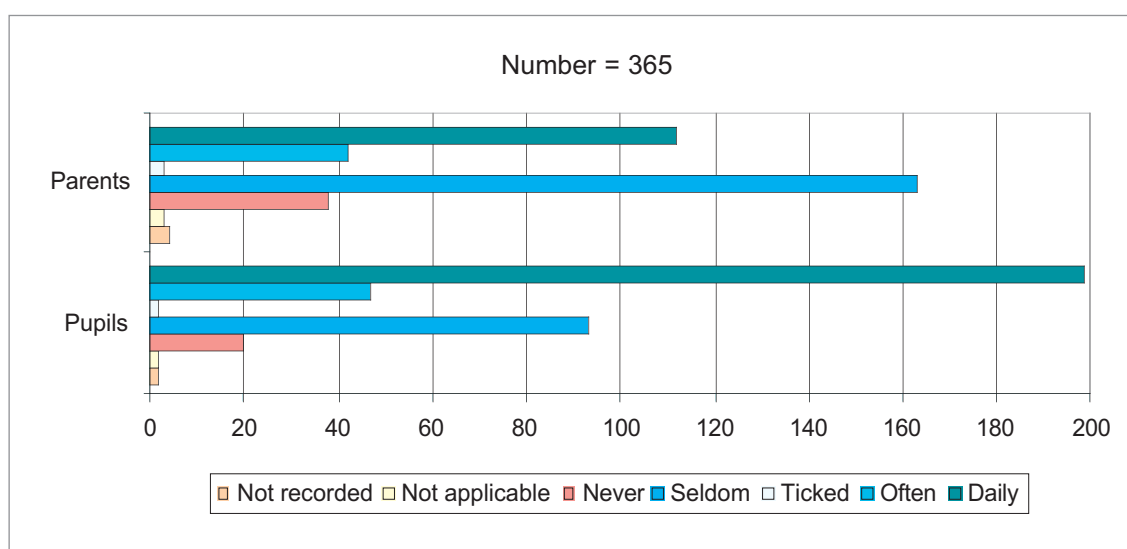
*I have actually done staff meeting presentations on different aspects. In that way they see the link. With getting together like that it's given us the opportunity to look at what we can develop on the teaching and administration side of things.*

*(Case study interview, 2006)*

**3.73.** In general, school business managers interact regularly with support and teaching staff in schools and recognise the importance of these relationships. Most are responsible for appointing, inducting, training and developing their support staff. They also appreciate the professionalism of teachers and provide support in a range of formal and informal ways. Nevertheless, there are tensions between teachers and support staff that must be managed by the business manager and the headteacher in order to ensure professional respect between both these groups.

## Parents and pupils

**3.74.** As the principal customers and clients of the school, understanding the needs of the parents and pupils and thus interacting with them on a regular basis should be a priority. Nevertheless, 31 per cent of business managers stated that they ‘seldom’ or ‘never’ interacted with pupils with 55 per cent making the same response for parents (Chart 3.11). Although these percentages reduced to 25 per cent and 31 per cent respectively for responses to how important the relationship is, the numbers are still high (Chart 3.12).

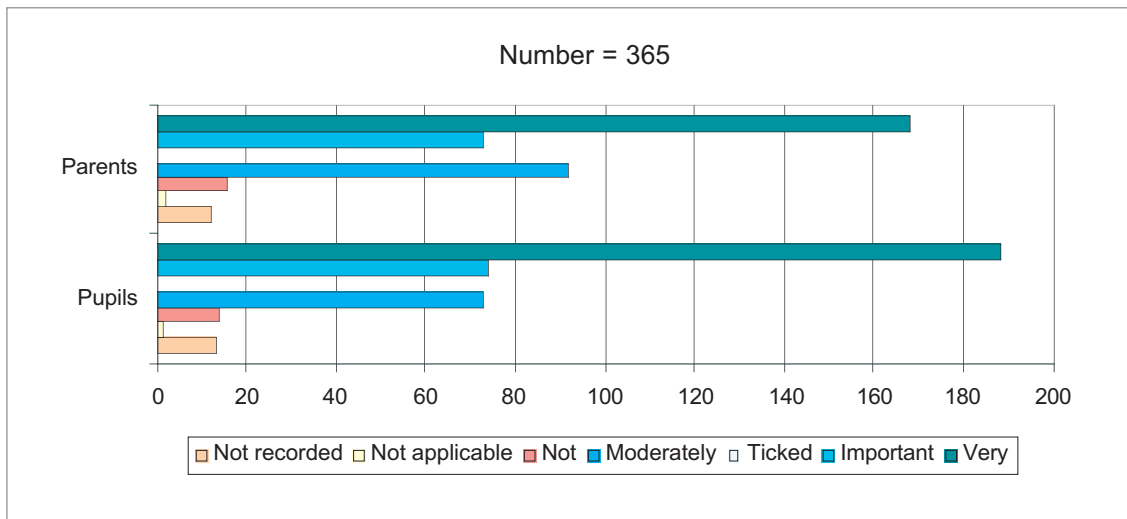


**Chart 3.11: Relationship with parents and pupils 2007**

**3.75.** Many of the business managers who do not interact with parents and pupils are located in secondary schools although they acknowledge both parents and pupils if they meet them in the corridor. Business managers in primary schools have a greater interaction with both parents and pupils, especially as many work in an open reception area or have offices located close to the school’s front door. This receptionist role is viewed as promoting a false perception of the responsibilities and activities of business managers.

*If I am to be taken seriously I need to clarify my role with staff and parents alike. I feel that parents think I deal with dinner money and answer a few phone calls – very far from the truth but unfortunately a lot of parents still relate schools to how they were run when they were at school.*

(Online focus group discussion, 2007)



**Chart 3.12: Importance of relationships with parents and pupils 2007**

**3.76.** The increasing involvement of school business managers in marketing activities is prompting them to consider and respond to the needs of parents and pupils and communicate with them more regularly. Many are also engaging with learning through taking part in learning walks and by considering improvement of the learning environment both inside and outside the school. Some are also considering how achievement data can be interrogated to provide teachers with reports that will provide insights about individual pupil development. Therefore, although survey respondents report little interaction with learning and teaching, evidence from focus groups, interviews and programme assignments demonstrates that engagement with pupils' learning is increasing and that school business managers are becoming more aware of the benefits of networking with both pupils and parents.

## Conclusion

**3.77.** School business management is a complex, generalist but highly context specific role that has evolved and is still developing in response to the complexity of the school environment. Between 2000 and 2007, there has been a movement away from principally finance and human resource management to a wider role that encompasses new core responsibilities of marketing, administration management and risk management. There is evidence that managing information systems, and facilities and support services management are becoming core responsibilities. It is also clear that activities are not being lost to make way for these increased responsibilities: business managers either absorb them or delegate to junior staff if funding is available. Core activities were found in finance, administrative, facilities, ICT and MIS management in 2004 but are now found in finance management only as business managers respond to the increasing number of activities they must address. Effective school business managers are clear that all responsibilities should focus on improving learning and teaching and the learning environment.

- 3.78.** Levels of operation have also dramatically changed from overwhelmingly administration to a balance of administration, management and leadership, between 2000 and 2007. Management activities include both human resource and information management. Significant changes in levels of operation, however, are no longer taking place, hence if an increase in systems or human resource management is required, it may take an intervention such as training programmes for performance management, project management and/or data evaluation and report writing.
- 3.79.** The days of the finance manager located in an office at the end of a corridor who is able to shut the door to concentrate on the accounts are long gone. School business managers interact with a wide range of internal and external stakeholders although they prioritise their relationship with the headteacher, support staff and local authorities. Working with the senior management team is also important to them. Each of these relationships contributes to their professionalism in different ways. The attitude of the headteacher defines how their role is recognised in school and for the relationship to be successful both have to work at communicating their needs and negotiating their contribution to learning and teaching. Support staff provide school business managers with the capacity to effectively discharge their responsibilities. Business managers, therefore, must be effective supervisors and communicators of the school's improvement initiatives. This relationship is sometimes complicated because the headteacher or other senior teaching staff, not the business manager, line manage these staff. Membership of, or a close working relationship with, the senior management team enables school business managers to understand learning and teaching and the support they can provide. Many primary school business managers express frustration at being excluded from this strategic group.
- 3.80.** The local authority is one agency, amongst a range that also includes NCSL and the TDA that provides support, training opportunities and promotion of the role, whilst Ofsted inspections and latterly, FMSiS can provide an indication of how effective school business managers are. There is increasing evidence that there has been a shift away from the type of business manager who is focused inwards on their own role to one that considers how to support all pupils and adults in the school. Effective school business managers, like headteachers, are widening their focus still further and are working with a range of external stakeholders. This is an approach that will evolve as more schools extend their services to work with other child support agencies.
- 3.81.** Between 2000 and 2007 there has been an expansion in responsibility areas, levels of operation and stakeholder relationships. Business managers, therefore, 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 learning and teaching.



To facilitate understanding of the role and to increase the capability of school business managers to operate effectively the following strategies are recommended:

- facilitate a dialogue amongst key stakeholders about the contribution of the role
- facilitate consultation with stakeholders into how skills that enable the exploration of the wider education and public service environment can be developed
- joint promotion of the role by the DCSF, TDA, NCSL, local authorities, professional associations and school business managers
- the development of strategies for smaller schools to share responsibilities
- the incorporation into development/training programmes of the school business managers' role and the benefits for headteachers and the SMT of working with them
- the development of performance management and project management modules for school business managers
- the development of a consultant school business leader programme