

5. Development of the profession

- 5.1.** The 2004 baseline report indicated that the number of school business managers was growing and that this was a predominantly female profession although men often held the high status roles as indicated by their higher salaries and job titles. There was no minimum qualification for entry into school business management. The highest academic qualification held by women was most likely to have been gained at school, whilst men held further and higher education qualifications.
- 5.2.** The difference between professional qualifications held by men and women was not as clear as the academic qualification differentials. Both men and women held accountancy, finance, business or administration qualifications. The CSBM and DSBM were still evolving and rolling out and so the impact of these school resource management programmes could not be assessed. It was suggested that there was a need for further academic and professional training in all education sectors to ensure diversity of provision and appropriately qualified school business managers.
- 5.3.** This section reports on entry into the role and career progression. It also discusses gender issues, considering: age; school types; titles; salary and qualifications. Salary is then discussed in more detail before training and development is addressed.

Entry into the role

- 5.4.** This is a profession characterised by entry from a variety of career backgrounds. As school business management evolves we would expect the number of entry sectors to decrease and routes into the profession to become established. Although 72 per cent of entrants are drawn from four sectors of education; finance; government and industry, the percentage entering by these routes has fallen by 12 per cent since 2004 suggesting that there are still no consolidated entry routes (Table 5.1).

Sector	2004 (n=346)	2007 (n=464)
Education	45%	20%
Finance	15%	23%
Government	12%	16%
Industry	12%	13%
Retail	3%	5%
Forces	2%	1%
Health Service	2%	3%
Self-employed	1%	3%
Tourism	1%	1%
Charity	1%	2%
Homemaker	not recorded	6%
Other	6%	7%
Total	100%	100%
Significant increase		Significant decrease

Table 5.1: Entry into the role 2004 and 2007

5.5. Entry through the finance sector is exhibiting the most significant increase suggesting that schools understand that finance management is core to the role, whilst increasing numbers appointed from local and central government also indicate an administration and information management focus. There are also increased numbers being appointed from the retail sector and self-employed businesses. These business managers would exhibit a customer focus and wider business management skills respectively.

5.6. Recruitment from inside the education sector continues to fall from 55 per cent in 2000 to 45 per cent in 2004 and 20 per cent in 2007. This reduction in education sector appointments would suggest that internal promotion and appointments from one school to another have not been established as career routes, although as more school business managers complete the CSBM and DSBM there may be an increase in these appointments. Between 2000 and 2007, there has also been a significant decrease, from 7 per cent to 1 per cent, in appointments from ex-forces personnel. Hence a traditional route into state sector school business management has almost disappeared.

Level of school business management	Professional qualification equivalent	Accreditation of prior learning & school business management professional qualifications	Mainstream academic qualifications
Clerical assistant	<ul style="list-style-type: none"> NVQ 1 in Administration or Business Certificate/Diploma in Book-keeping Accounting certificate Certificate in Business and Administration or ICT Foundation Certificate in Health & Safety 	Evidence of secondary education	GCSE Grades D-G
Finance, administration or support services assistant	<ul style="list-style-type: none"> NVQ 2 in Administration, Business or Accounting Certificate/Diploma Accounting Certificate/Diploma in Business and Administration/ ICT/ Customer Services Certificate in Support Work in Schools 	Previous work experience at clerical level	GCSE Grades A*-C
Finance, administration or support services officer	<ul style="list-style-type: none"> NVQ 3 in Administration, Business or Accounting Finance Association of Accounting Technicians Intermediate Level Institute of Management CLAIT Advanced/ECDL Advance Certificate in Occupational Health & Safety Progression Award in Counselling 	Ability to work independently	Certificate in management and/or A-Levels
Office manager or support services manager	<ul style="list-style-type: none"> NVQ 4 in Administrative Management Intermediate or Final Certificate of Professional Accounting Certificate of Management or similar 	CSBM and work at supervisory level including financial responsibility	Certificate of Higher Education
School business manager	<ul style="list-style-type: none"> NVQ 5 Administrative Management or Leadership & Management Intermediate or Final Diploma of Professional Accounting Diploma of Management or similar 	DSBM and history of work at first line manager level including decision-making authority	Diploma of Higher Education Foundation degree in Business Management
Business director or director of support services	<ul style="list-style-type: none"> NVQ 6 Management, Administrative Management or Leadership & Management NPQH Full membership by examination of a professional accounting or management institute 	DSBM and history of work at senior management level including strategic management	Bachelor and Honours degree, graduate certificate or diploma
Head of business and resources	<ul style="list-style-type: none"> NVQ 7 in Management, Administrative Management or Leadership & Management Chartered membership of a professional body. Executive Diploma in management or similar 	LNBA and high level specialist professional knowledge.	Postgraduate certificate or diploma, full masters degree in subject relevant to bursarship, MBA
Director of finance and resources	<ul style="list-style-type: none"> NVQ 8 Management Fellowship or equivalent by exam of a professional institute in appropriate discipline 	Recognised by peers as exhibiting substantial expertise and experience in senior educational leadership	EdD in Educational Leadership or PhD

Table 5.2: A framework for school business manager career progression

Career progression

- 5.7.** The variety of entry routes is an indication that career progression has not yet been established for school business managers. There are likely to be four contributing factors to this reduction in opportunities for those already 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 the funds to employ junior office staff who can grow into the role.
 - ii. Strategic level development:** larger schools employ specialist staff with single skills such as accountancy or facilities management and these staff would require further training in the broader aspects of the role before they could transfer to school business management.
 - iii. CPD provision:** training demands cannot be met for those within the sector who need to understand how to operate at management and leadership level across increasing numbers of core responsibility areas.
 - iv. Loyalty to their current 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.
- 5.8.** The debate about the title for this profession (Section 4) is also an indication that even within the profession, career progression is unclear. Nevertheless, the Council for Administration (CfA) has led discussions about school office staff roles, skills and competencies and further work has been completed on aligning national vocational qualifications with career experience and academic or professional qualifications linked to the new national qualifications framework. The framework in Table 5.2 has been derived from these developments. It is divided into three career categories:
- i. Emergent.** The first three levels suggest a hierarchy of roles leading into full school business management. Titles would indicate a junior level of operation, and professional training at this level is likely to specialise in one of the school business management responsibility areas.
 - ii. Established.** The three 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 could also hold the CSBM and/or the DSBM or higher education certificates, foundation degrees or full degrees.
 - iii. Expert.** Expert school business managers hold titles recognising both the high level of operation and the breadth of the role; usually encompassing two specialisms. They hold doctoral or masters qualifications that might include the NBA's licentiate.

- 5.9.** For many who are approaching the expert school business level there is uncertainty about the next stage of their development. Some are taking, or have completed 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. Others are leaving schools and setting up their own businesses as consultant business managers or trainers. The changes in child support services could also provide new opportunities for school business managers. There will be a greater need for resource management skills as schools work with wider children's services that might even result in expert business managers moving into public service directorships.
- 5.10.** Responses to the national survey indicate that few full-time school business managers are engaged in consultancy. Most respondents who were engaged in consultancy were assisting or liaising with other schools, for example, primary school business managers supporting other primary schools and secondary school business managers working closely with their feeder schools. Further support was provided to governors and leadership teams appointing new school business managers. Here, expert business managers were employed to identify 'ringers' who might be able to talk as if they understood the role but would be unable to operate in the school.
- 5.11.** A further category of consultants is involved in training and development. Some school business managers have progressed through the CSBM and DSBM and are now being recruited to tutor on the CSBM. The NBA also uses expert school business managers to mentor their LNBA applicants, and business managers are being used by training organisations to provide specialist education management training for other school business managers or senior support staff.
- 5.12.** The school business management profession is still emerging but consolidation is taking place in relation to entry and career progression. Finance is becoming the preferred entry route as is an education background. Nevertheless, there are still diverse routes into school business management. Career progression is also becoming clearer as the TDA, NCSL and CfA work together to build a framework and as more universities become involved in providing academic qualifications for school business managers. Nevertheless, movement and promotion within the profession and the employment of consultant school business managers is still limited

Gender considerations

- 5.13.** School business management is one of those rare professions characterised by a predominantly female workforce. Approximately 80 per cent of school business managers are women but there is also an indication that it is the female population that is aging (Chart 5.1). In 2004, there were more male school business managers aged 56-65, whereas in 2007 there are clearly more females within this age-group. The percentage of females in the 46-65 age-groups has also increased from 60 per cent in 2004 to 64 per cent in 2007. This shift in the gender and age split may be an indication that more males are ready to move into the profession and that they will replace women as they retire.

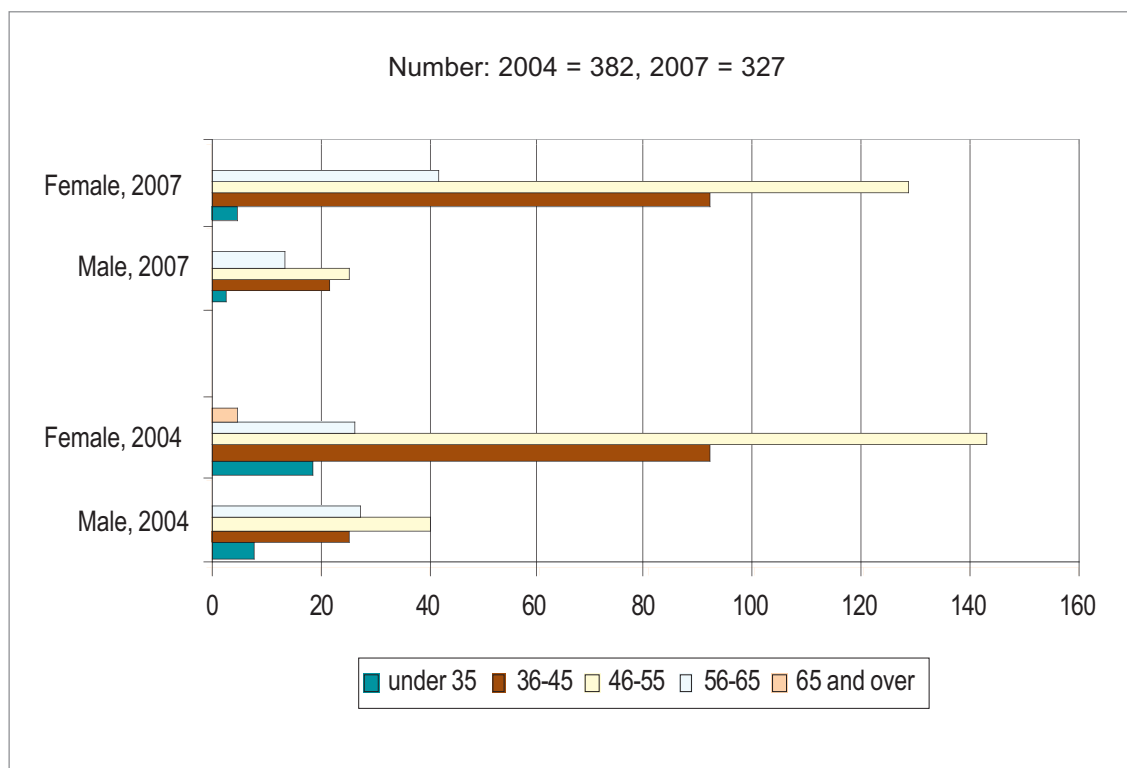


Chart 5.1: Age of school business managers according to gender 2004 and 2007

5.14. The pattern of males replacing females may already be emerging as demonstrated in Table 5.3. Although analysis of the length of time school business managers have been working in a bursars' roles reveals a similar pattern of experience for both men and women there is an indication that more men are beginning to enter the profession. It is too early, however, to discern whether this is a trend. It is clear, however, that, in 2004 and 2007 approximately half of both genders had less than five years experience of school business management.

Years of Experience	2007 Female (n=231)	2007 Female (n=222)	2004 Male (n=90)	2007 Male (n=62)
Less than 1 year	0	9%	1%	15%
1-5 years	44%	39%	49%	30%
6-10 years	26%	25%	29%	27%
11-15 years	22%	21%	20%	21%
16-20 years	7%	5%	0	5%
21-25 years	1%	1%	1%	2%
Total	100%	100%	100%	100%
Significant increase		Significant decrease		

Table 5.3: Gender and experience 2004 and 2007

- 5.15.** In 2004, male school business managers came from a variety of backgrounds, the most common being, education (23 per cent), finance (23 per cent), local government/civil services (18 per cent), industry (13 per cent) or the forces (10 per cent), (Table 5.4). In 2007, male school business managers were still principally employed from finance (20 per cent), education (13 per cent), government (12 per cent) and industry backgrounds (12 per cent) but the numbers coming from ‘other’ uncategorised sectors had increased to 29 per cent, indicating that men from a range of sectors are attracted to the role. The percentage joining from the forces has reduced from 10 per cent to 3 per cent

Qualification	2004 Female (n=256)	2007 Female (n=365)	2004 Male (n=90)	2007 Male (n=133)
Education	49%	20%	23%	13%
Finance	11%	23%	23%	20%
Government	11%	14%	18%	12%
Industry	12%	13%	13%	12%
Retail	3%	5%	3%	3%
Forces	1%	1%	10%	3%
Health service	3%	3%	0	1%
Self-employed	1%	2%	2%	4%
Tourism	1%	1%	2%	1%
Charity	1%	1%	3%	2%
Homemaker	n/a	8%	n/a	0
Other	7%	9%	3%	29%
Total	100%	100%	100%	100%
Significant increase		Significant decrease		

Table 5.4: Gender and entry into the role 2004 – 2007

- 5.16.** There is a similar picture for women (Table 5.4). In 2007, almost half had been working in the finance sector (20 per cent) or education (23 per cent) before they started working as school business managers. A further 14 per cent and 13 per cent came from local or central government and industry respectively. Hence 70 per cent of female school business managers are drawn from four sectors. The survey included ‘homemaker’ as a career category for the first time and 8 per cent stated that they had entered the profession via this route.

The percentage claiming to have entered via education has reduced significantly from 49 per cent in 2004 to 23 per cent in 2007 whilst the percentage from the finance sector has increased from 11 per cent in 2004 to 23 per cent, signifying that finance may become a preferred career route for female school business managers.

- 5.17.** Most female school business managers work in primary and secondary schools (41 per cent and 38 per cent respectively), whereas 79 per cent of male school business managers are employed in secondary schools (Chart 5.2). Hence, females have the expertise and are represented across all phases and types of schools whereas males work in secondary schools which are considered to provide higher status jobs and pay higher salaries.

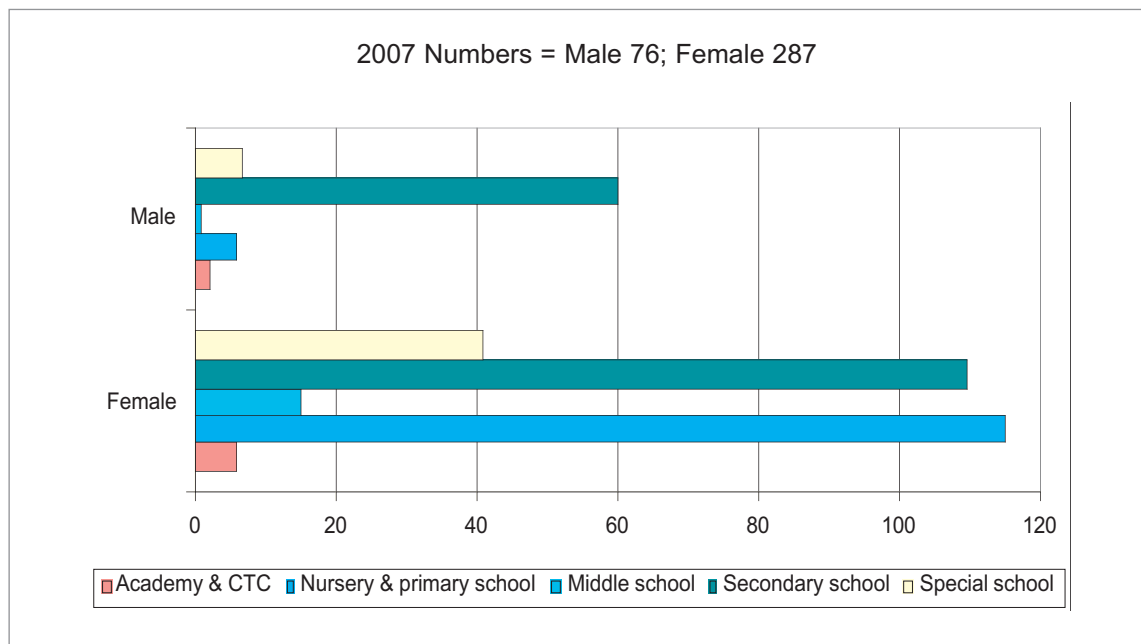


Chart 5.2: School business managers by phase according to gender 2007

Gender and titles

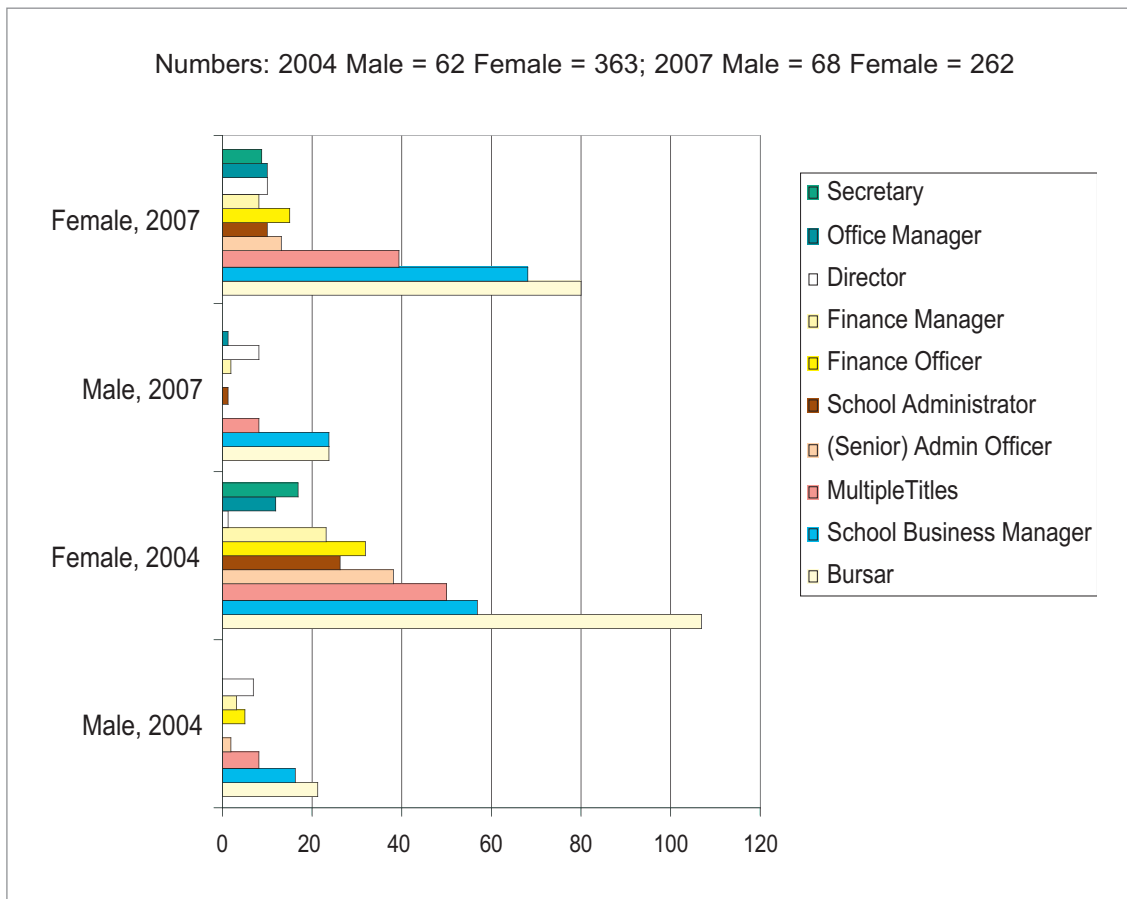


Chart 5.3: Most common school business management titles 2004 and 2007

- 5.18.** If titles are considered as an indicator of status, the most common title for both men and women is 'bursar' or 'school business manager' suggesting a similar perception of the role for both genders. There is a clear indication, however, that there has been a consolidation of titles, particularly for male school business managers whose titles have reduced to four groupings (Chart 5.3). Although there is still a small percentage of finance managers most are bursars, school business managers and directors. Where multiple titles are used they usually include the word 'manager'. There is a tendency, therefore, to assign male school business managers a high status title.

- 5.19.** Female school business managers hold a wider range of titles although the most common are also 'bursar' and 'school business manager'. Multiple titles appear to be equally distributed between 'manager' and 'officer' or include titles that do not presuppose a level of operation, eg bursar and administration manager, bursar and administrative officer or bursar and administrator. It is the female school business managers who still hold lower status administration titles. Some are called school secretary despite having adopted a wider business management role.
- 5.20.** It would seem, therefore, that male school business managers are already holding the higher status job titles. This is most evident in the numbers of 'directors' and multiple titles that signify a management level of operation. Many female school business managers, however, also hold these high status titles, and titles indicating junior positions eg 'administration assistant' are disappearing. Therefore, despite the apparent increase in status and subsequent attractiveness of the role to men, women are able to compete with them, maintain their numbers in schools and raise their own status by negotiating new titles that represent the increase in their responsibilities.

Gender and salaries

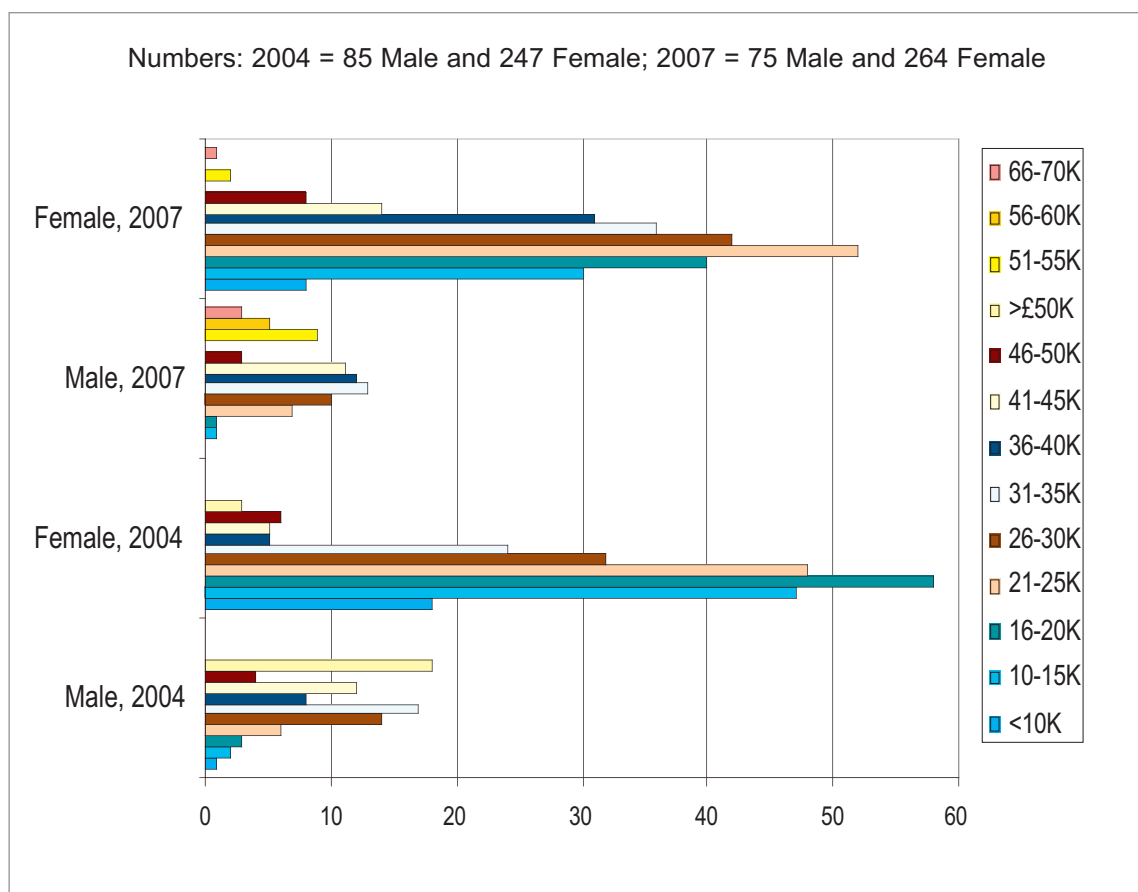


Chart 5.4: A comparison of salaries 2004 and 2007

- 5.21.** When salaries are compared between 2004 and 2007, there are indications that they have increased for both males and females (Chart 5.4). Males have almost completely moved out of the under £20,000 bracket. In 2004 their highest salary bracket was over £50,000 and there was a further peak salary of £31,000 to £35,000. As a result of the peak in the £50,000 salary bracket, the latest survey added options of £56,000 to £60,000 and £66,000 to £70,000 and this development has produced a normal distribution curve of salaries for males that, as in 2004, has a median of £31,000 to £35,000. Almost a quarter, however, are earning more than £50,000. In common with the 2004 returns, earnings between £46,000 and £50,000 show a dip within the distribution curve.
- 5.22.** Female earnings also produce a normal distribution curve and demonstrate a reduction in the percentage earning below £10,000 although there are still 29.5 per cent who earn below £20,000 (Chart 5.4). The median, however, has increased from between £16,000 and £20,000 to between £21,000 and £25,000 and the numbers earning between £26,000 and £40,000 have also risen. When compared with male salaries, therefore, it would seem that the differential is reducing and that female school business managers are retaining their numbers within the profession and increasing their remuneration.
- 5.23.** When compared with the 2004 returns, there is a clear indication that, in 2007, fewer school business managers hold lower level qualifications such as A-levels and a higher proportion have gained higher level vocational and academic qualifications (Table 5.5). Female school business managers, in particular are raising their lowest academic qualifications from the school-leaving level to HNC/D, NVQ 4/5. The percentage of men with the lowest qualifications has also reduced. Although they have also raised their qualifications to HNC/D, NVQ 4/5 level, there has also been an increase in the numbers with A-level qualifications.

Gender and qualifications

Qualification	2004 Female (n=270)	2007 Female (n=245)	2004 Male (n=96)	2007 Male (n=62)
GCSE, GCE, CSE, RSA	35%	23%	18%	8%
A Levels	16%	16%	17%	23%
ONC/D, BTEC/NVQ 2/3	10%	11%	4%	0
HNC/D, BTEC/NVQ 4/5	11%	25%	5%	16%
Foundation and degree	18%	19%	29%	29%
Masters and doctorate	3%	4%	14%	18%
Other	7%	2%	13%	6%
Total	100%	100%	100%	100%
Significant increase		Significant decrease		

Table 5.5: Gender and academic qualifications 2004 and 2007

- 5.24.** Table 5.5 also demonstrates that a higher percentage of men hold more advanced qualifications than women. Forty-seven percent of men have degrees and masters level qualifications whereas only 23 per cent of women are qualified to this level. Women, however, are increasing their qualification levels. The most likely explanation is the school business management programme provision offered by the NCSL which significant numbers have successfully completed.
- 5.25.** Analysis of professional qualifications indicates that there is no significant gender difference in the range of professional qualifications held. There has, however, been a decrease in the number of women holding no professional qualification at all. Table 5.6 shows that 78 per cent of males hold finance, school business management, business and administration professional qualifications. 69 per cent of female school business managers hold the same professional qualifications but a further 13 per cent also have secretarial qualifications. Hence a greater number of male business managers hold a finance qualification to address this core responsibility area. Female school business managers hold a range of qualifications that address various responsibility areas that suggest a focus on office management as well as the finance management role. It would appear, therefore, that academic qualifications affect status and that the type of professional qualifications might also affect status.

	Female (no responses =494)	Male (No responses = 112)
Finance	17%	39%
Administration	14%	10%
Business	12%	11%
Secretarial	13%	2%
ICT	5%	1%
Health and safety	3%	4%
Personnel	4%	3%
Teaching	2%	6%
Marketing	1%	0%
Facilities	0%	2%
CSBM	20%	13%
DSBM	5%	4%
LNBA	1%	1%
None	1%	1%
Other	2%	3%
Total	100%	100%

Table 5.6: A comparison of gender and professional qualifications 2007

Gender, levels of operation and status

- 5.26.** A final factor influencing gender and status might be the level at which school business managers operate. If levels of operation are explored by gender, the highest percentage of females operates at administration or administration/leadership levels, whereas the males work at management or management/leadership level (Chart 5.5). This difference in operating levels is a result of males working predominantly in secondary phase schools with greater pupil numbers where they are employing clerks for administration activities, and in some cases, middle managers to supervise them. Those females working in smaller primary phase schools may aspire to balanced levels of operation but must ensure that administration is in order whilst, at the same time, working with the headteacher on leadership activities. Hence management activity is squeezed out, either because there are no support staff to manage or because time is not put aside for management information activities. Nevertheless Chart 5.5 evidences a shift, by both males and females, away from predominantly administration activity.
- 5.27.** Data from the 2004 survey suggested a two-tier profession with men being paid more, holding higher status titles and holding better qualifications. The 2007 data still suggests that men are working in high status roles. It is also likely that as perception of the status of the profession rises, as a result of increased salary levels and more adverts using 'manager' and 'director' titles, more men will be attracted to school business management. Until national qualifications were developed, the majority of women may not have thought about their professional development and may have felt that academic qualifications were beyond them. Women, however, are now closing the gap as they improve their qualifications, demonstrate their professionalism and argue for titles that represent their new roles. 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.

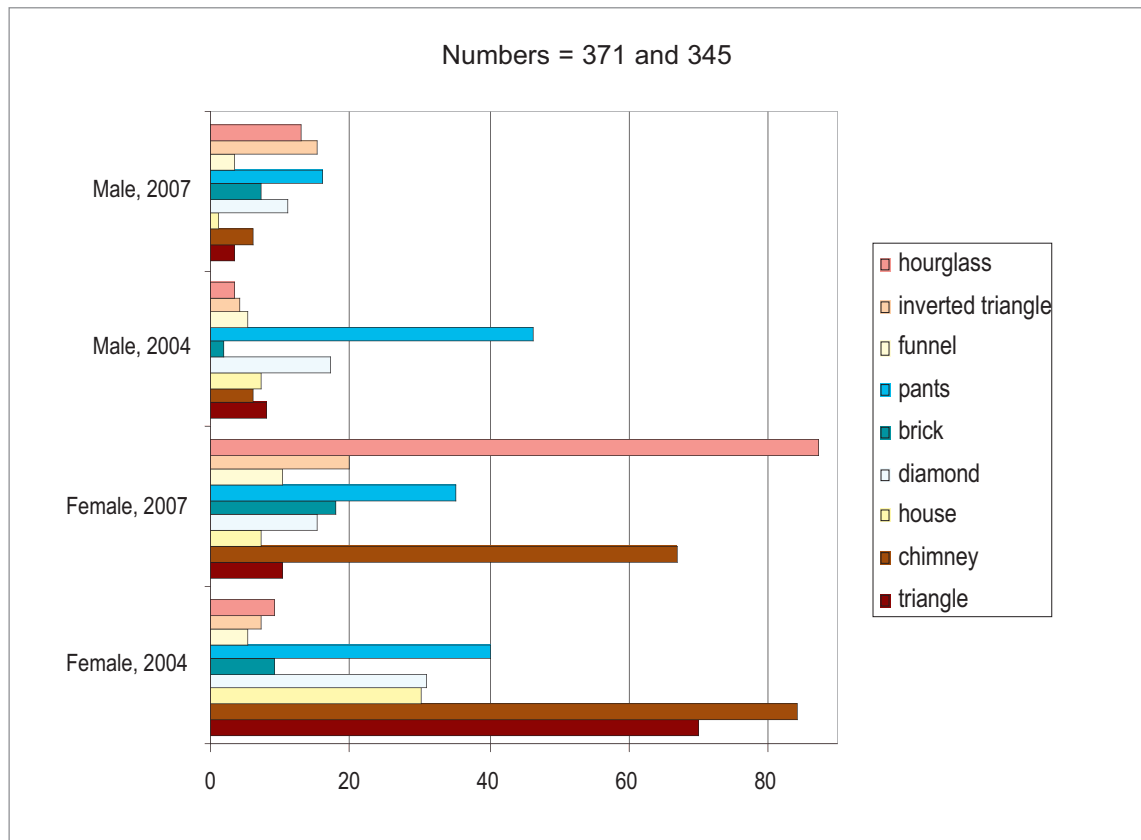


Chart 5.5: Level of operation and gender 2004 and 2007

Remuneration and reward

5.28. The 2004 report suggested that, since 2000, the average salary of school business managers had risen faster than inflation and that the numbers earning under £10,000 were reducing. Between 2004 and 2007, the percentage of school business managers earning salaries under £20,000 has reduced further from 40 per cent to 23 per cent and those earning under £10,000 have fallen from 6 per cent to 2 per cent (Chart 5.6). Most significantly, the numbers earning £36,000 to £40,000 have risen from 4 per cent to 13 per cent. The average salary has also risen faster than inflation, by £5,000.

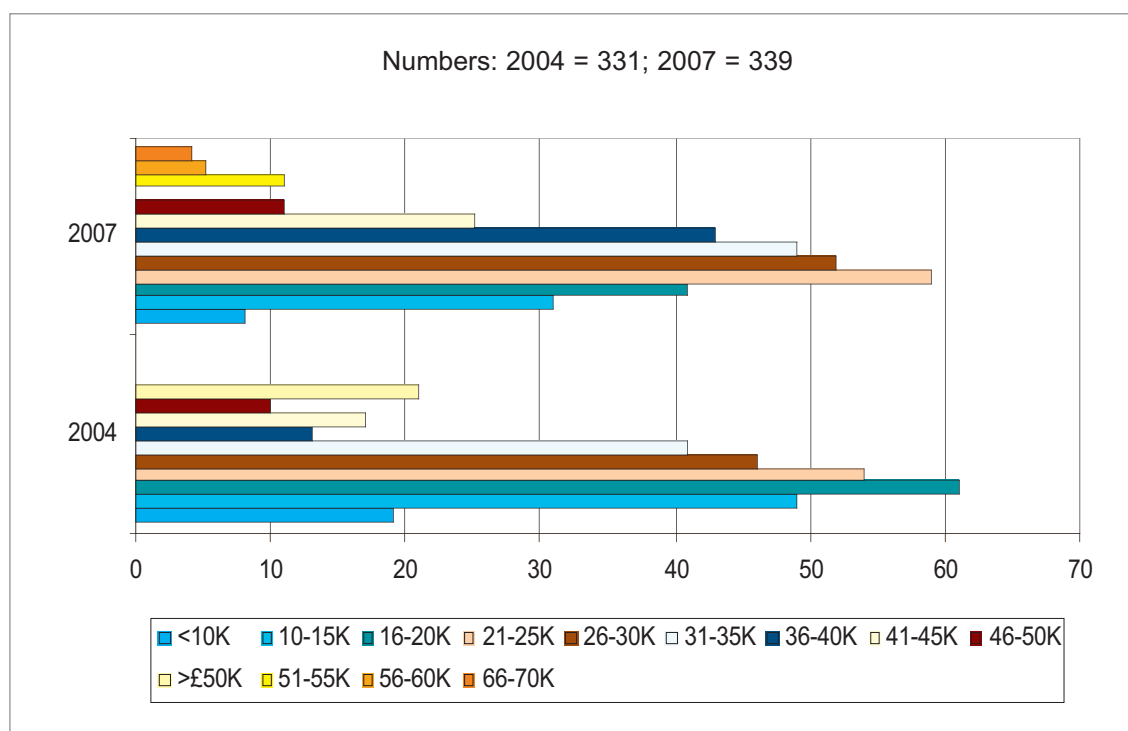


Chart 5.6: Salaries 2004 and 2007

- 5.29.** This rise in average salaries might be the result of improved professional and academic training or it may be an indication of an increasing value being placed on school business managers and the experience they bring to the role. If salaries are increasing as a result of market-place requirements, they are also being held back and even decreasing in some schools as a result of local authority misunderstanding of the role. This intervention is currently the most talked about issue for school business managers and it is demotivating a profession that is dedicated to supporting school improvement.

I have just been appointed School Business Manager at a local secondary school, commencing in March. I feel very sad to leave my current school, however, have come to realise that the fight will continue with LA's up and down the country to recognise the job that we do in primaries is critical in building an excellent school. I now feel that I have gone as far as I can in a Primary school, but the frustration of knowing my own potential and that I can offer more has spurred me to change my job.

(Online focus group, 2007)

- 5.30.** When the number of years in post is examined, it would seem that experience is not a factor that affects salary levels as there is no discernable pattern (Chart 5.7). Apart from those with 10 to 15 years experience whose modal salary is £31,000 to £35,000, modal earnings for all other years in post are £21,000 to £25,000. Each grouping of years of experience includes school business managers who earn less than £10,000, and apart from those with 5 to 10 years experience, each grouping also earns up to the maximum of £66,000 to £70,000.

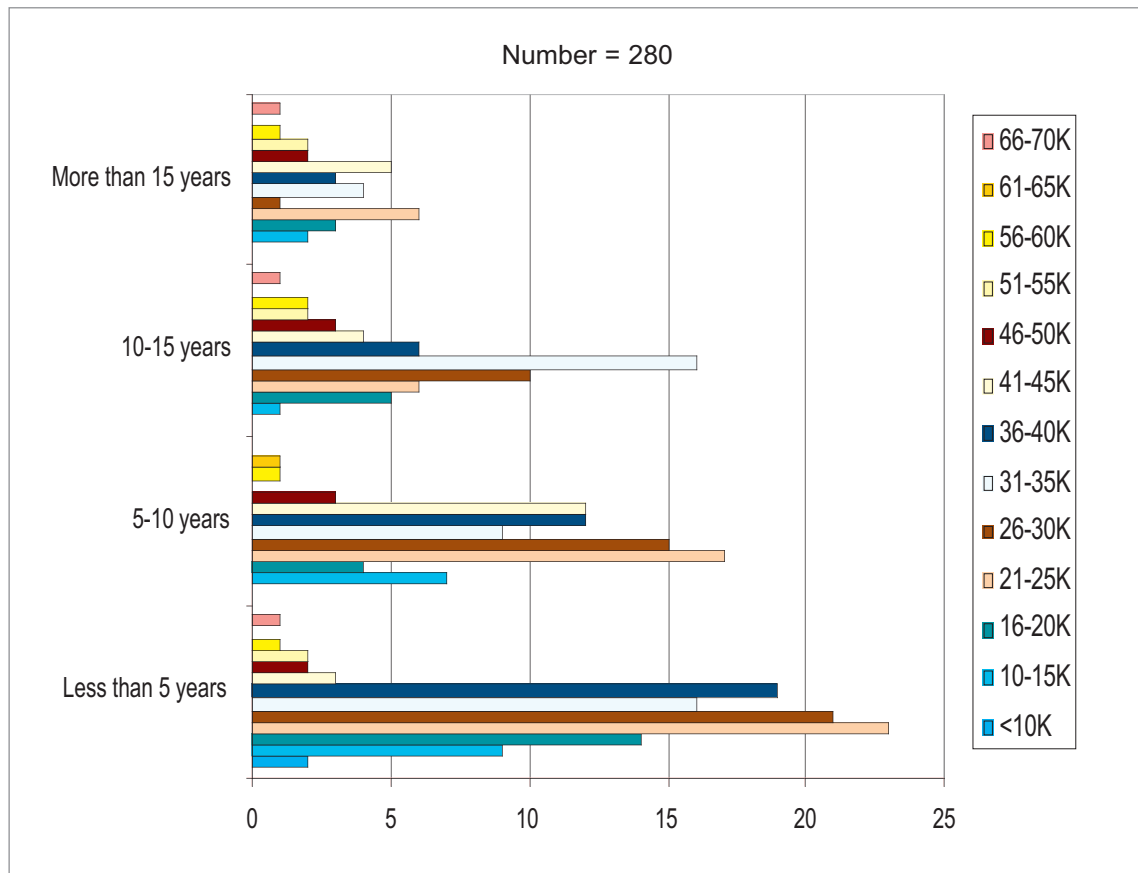


Chart 5.7: A comparison of school business managers' salaries and experience 2007

5.31. At first glance of Chart 5.8, the level of qualification held by school business managers is not an indicator of salary expectation, for example, those qualified to GCSE or equivalent academic levels earn salaries ranging from below £10,000 up to £51,000 to £55,000. There are school business managers holding qualifications higher than A-levels, however, earning less than £10,000 and there are business managers working in schools who hold a degree and yet are paid in the £10,000 to £15,000 bracket. At the opposite end of the salary range (£66,000 to £77,000), the minimum qualifications held are HNC/D, BTEC, and NVQ4/5.

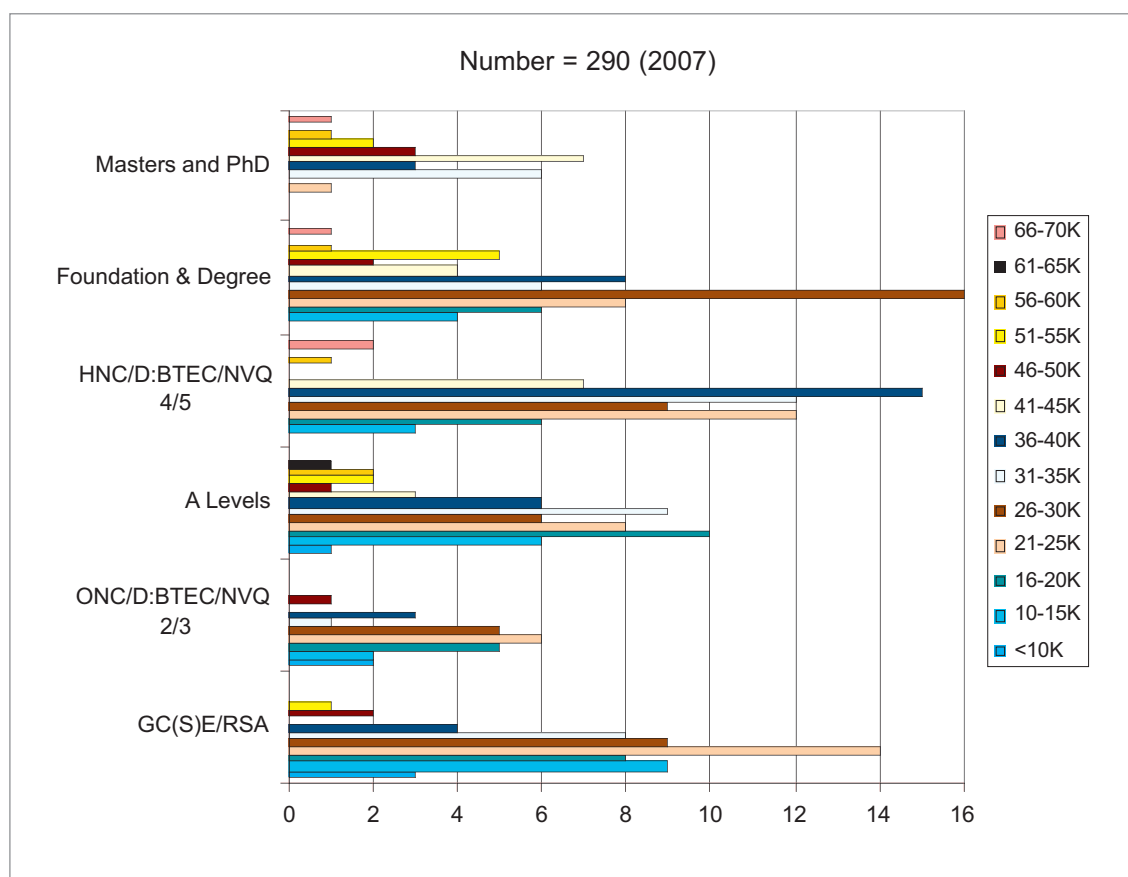


Chart 5.8: A comparison of salaries and qualifications 2007

5.32. When median and mode calculations are taken, however, apart from an anomaly with ONC/D/BTEC/NVQ 2/3 qualifications, there is a progression in income as qualifications increase in level (Table 5.7). There is a similar progression when the mode is calculated, although A-levels and degrees exhibit anomalies. There appears to be no explanation for the lower mode calculation for those holding degrees. In the case of A-levels, however, there was only one point difference from the £31,000 to £35,000 salary range which would have resulted in two mode points.

Academic Qualification	Median	Mode	Range
G(C)SE/RSA	£30,000	£21,000 – £25,000	Less than £10,000 – £51,000/£55,000
ONC/D/BTEC/NVQ 2/3	£26,000 - £30,000	£21,000 – £25,000	Less than £10,000 – £46,000/£50,000
A-Levels	£35,000	£16,000 – £20,000	Less than £10,000 – £61,000/£65,000
HNC/D/BTEC/NVQ 4/5	£40,000	£35,000 – £40,000	£10,000/15,000 – £66,000/£70,000
Degree	£40,000	£26,000 – £30,000	£10,000/15,000 – £66,000/£70,000
Masters & PhD	£45,000	£41,000 – £45,000	£21,000/25,000 – £66,000/£70,000

Table 5.7: A Comparison of median and mode salaries and levels of qualifications 2007

- 5.33.** An analysis of professional qualifications and salaries indicates that ICT qualifications attract the lowest earnings whilst teaching and finance attract the highest (Table 5.8). Personnel qualifications remain the most marketable for school business managers exhibiting a mode of £36,000 to £40,000. This is possibly due to demand exceeding supply for those who hold these increasingly relevant qualifications. Returns for facilities and marketing qualifications and the LNBA were too low to extract any meaningful interpretation. The range of salaries earned by CSBM graduates is between £10,000 or less, and £46,000 to £50,000: the mode being £31,000 to £35,000. DSBM graduates attract salaries between £10,000 and £15,000 and £61,000 to £65,000 and the same mode as for the CSBM. The NBA's qualification attracts similar salaries to the DSBM.
- 5.34.** Interestingly, the modal earnings for academic qualifications and experience has risen from between £16,000 and £20,000 in 2004 to between £21,000 and £25,000 in 2007. The mode for professional qualifications has remained constant at the higher earnings level of £26,000 to £30,000, perhaps indicating that professional qualifications are still valued more highly than academic qualifications or experience.

Professional Qualification	Mode	Range
ICT	£10,000 – £15,000	Less than £10,000 – £66,000/£70,000
Secretarial	£16,000 – £20,000	Less than £10,000 – £51,000/£55,000
Business	£16,000 – £20,000	Less than £10,000 – £66,000/£70,000
Health and safety	£21,000 – £25,000	£10,000/15,000 – £61,000/£65,000
Administration	£21,000 – £25,000	Less than £10,000 – £61,000/£65,000
CSBM	£31,000 – £35,000	Less than £10,000 – £61,000/£65,000
Finance	£31,000 – £35,000	Less than £10,000 – £61,000/£70,000
DSBM	£31,000 – £35,000	£10,000/£15,000 – £61,000/£65,000
Personnel	£36,000 – £40,000	£10,000/£15,000 – £61,000/£65,000
Teaching	£51,000 – £55,000	£10,000/£15,000 – £56,000/£60,000

Table 5.8: A comparison of mode salaries and professional qualification specialities 2007

- 5.35.** In conclusion, there are indications that school business management is an ageing profession that will require constant replacement and demand for training provision is unlikely to fall. It is also likely, that the 80 per cent of female school business managers are currently able to compete with men entering the profession as a result of the training received through the CSBM and DSBM. They will, however, face more competition as salaries and status rise in response to the increased professionalism of the role.

Training and development

5.36. The range of training specific to school business managers is widening. Both professional and academic programmes are being developed and those that have been available for some time are evolving. This section explores the range of training that is available, how it is provided and which responsibility areas they address.

Academic qualifications

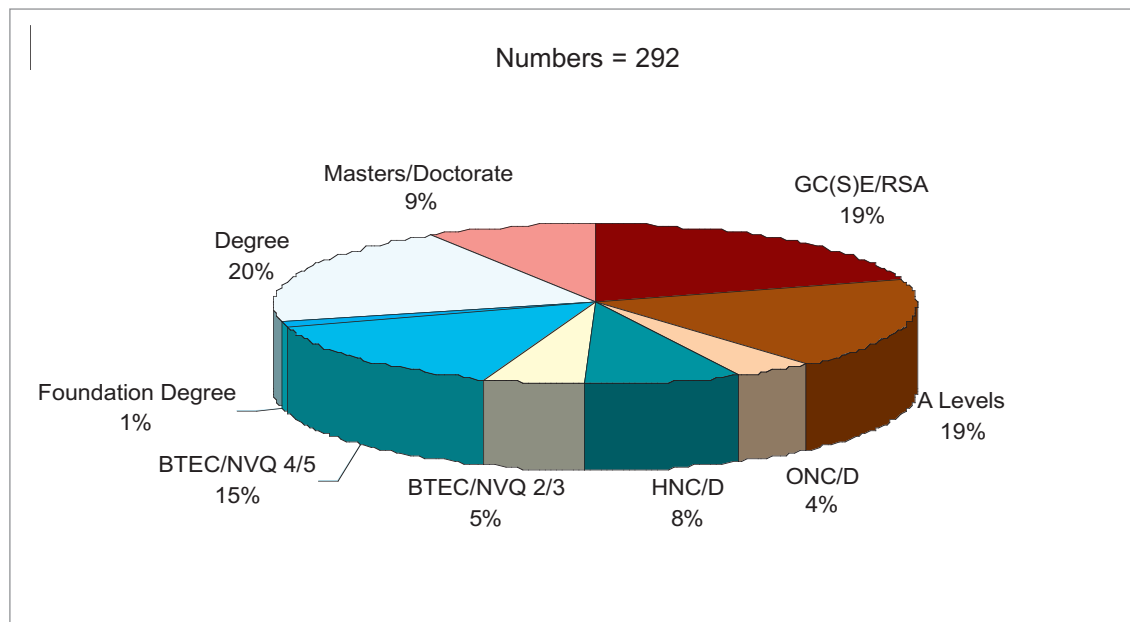


Table 5.9: Highest qualifications 2007

5.37. In 2007, there is still no minimum qualification level required to become a school business manager (Chart 5.9). There is however, evidence of a shift in the minimum qualifications they hold. In 2000, 52 per cent had gained their highest qualification at school and this percentage had risen to 55 per cent in 2004. The percentage has now fallen to 38 per cent, with 32 per cent holding FE level qualifications as opposed to 18 per cent in 2004. The numbers holding degrees and masters have remained constant between 2004 and 2007. More encouragingly, the percentage holding qualifications no higher than A-level has fallen from almost 75 per cent in 2004 to almost 50 per cent in 2007.

Further and higher education

- 5.38.** NVQ level qualifications are available across the country through a range of programmes that provide administration, business and specialist responsibility qualifications although they are not specialist school business management programmes. Until recently, there has been no specialist degree programme, but Manchester Metropolitan University (MMU), who are providers of the CSBM and DSBM now offer a BA (Honours) Degree in School Business Management. This is intended to be a top-up degree for graduates of the DSBM. It is a two to six year part-time undergraduate course. Around eighty candidates have either completed or are undertaking this programme.
- 5.39.** Until 2006, the University of Lincoln offered an MBA in school leadership for school business managers. This programme has now ceased and as a result of the move of key members of staff from Lincoln to the University of London, the London Institute of Education has just begun delivering an MBA in School Business Leadership (International), for school business managers that has a similar format and content to their MBA for teacher leaders. The University of Leister also offers a full masters programme to school business managers who complete the National Bursars Association's LNBA run by their Education Management Unit.
- 5.40.** Many other universities offer masters qualifications in education management or leadership. On further scrutiny, however, school staff who do not possess a teaching certificate are excluded from entry onto the majority of these programmes. Those listed below appear not to make this requirement and therefore the qualifications would be accessible to school business managers:
- Cornwall College – MA Management (Education)
 - University of Bath – MA in Education (Educational Management)
 - Lancashire University Management School – MA Management, Learning & Leadership
- 5.41.** School business managers' access to masters programmes has been further restricted by the Higher Education Funding Council's withdrawal of core funding for part-time Band D masters programmes. This development has resulted in appreciably higher fees being charged for these programmes which are prohibitive to many school business managers. School staff with qualified teacher status, however, can access Training and Development Agency (TDA) postgraduate professional development grants.

Professional training and development

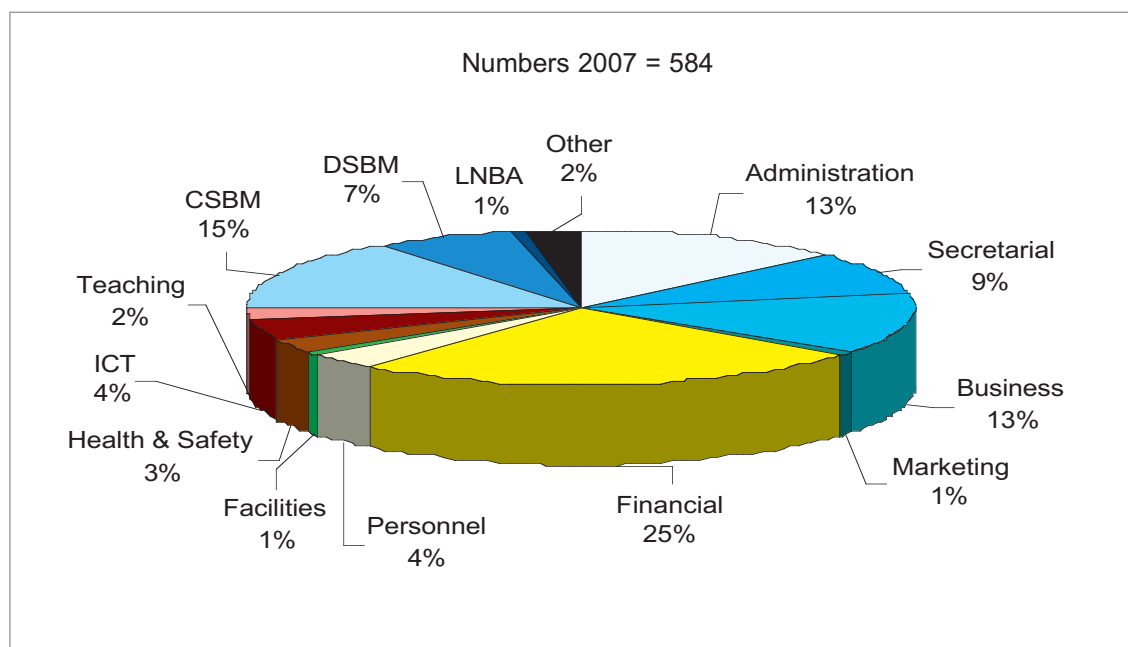


Chart 5.10: Professional qualifications 2007

5.42. Professional qualifications have been grouped according to the CSBM modules and secretarial and business qualifications added to reflect the responses to the 2004 survey. To complete the range of qualifications available, school business management and teaching qualifications have also been included. In 2000 and 2004 finance qualifications comprised the largest single percentage of professional qualifications, followed by secretarial qualifications. In 2007, finance qualifications still comprise the highest percentage of qualifications, but secretarial qualifications have fallen behind the CSBM, administration and business (Chart 5.10). 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.

National College for School Leadership

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 CSBM and DSBM are vital in building this professional respect.

(Online focus group discussion, 2007)

The Bursar Development Programme (BDP)

5.43. The NCSL is now the principal provider of programmes for school business managers. The CSBM offers approximately 1,400 places nationally per year and is delivered locally through approved training providers in the nine government regions. It has a broad equivalence to the national qualifications framework (NQF) level 4, ie the first year of a first degree. The CSBM provides school business managers with an accredited course which focuses on their role and covers a total of eight recently revised subject areas:

- school business management
- facilities management
- risk management
- finance management
- office systems management
- ICT management
- human resource management
- environmental management (sustainable development)

5.44. Fees for state school business managers or those who would like to work in state schools are currently paid by central government. The courses are accessible to people with alternative professional backgrounds such as commercial services, industry and other public sector organisations.

5.45. The DSBM offers approximately 300 places nationally per year and, as with the CSBM, is delivered locally through approved training providers in the nine government regions. The DSBM has a broad equivalence to the NQF level 5 (eg the second year of a first degree). The DSBM is designed at an advanced level to the CSBM and is aimed at school business managers working with the school senior management team, although it is available to suitably qualified external candidates. It focuses on the role the school business manager can play in determining the strategic direction of their school and covers three broad topic areas:

- strategic management
- change management
- managing school improvement

- 5.46.** NCSL has also developed, with local stakeholders, a number of locally organised CSBM courses which are additional to the national programme and are administered by the College's contractors. Despite this increased training provision there were still requests from national survey respondents for greater access, with some suggesting programmes run within their local authority. It is likely that these requests are the result of increased awareness of this provision.
- 5.47.** In response to requests from external candidates to the CSBM and DSBM, NCSL also provides a two day induction course for external candidates who are accepted onto bursar development programmes. This induction course used to run once a year, but has recently increased to biannual provision to meet increasing demand.

The National Professional Qualification for Headship (NPQH)

- 5.48.** Provided by NCSL, NPQH has been designed to prepare candidates for the role of headship. Anyone with sound experience of leadership at a whole-school level can apply for a place on NPQH. Normally this experience will have been gained as a member of the school's leadership team. Those applying for NPQH must have the support of their headteacher or line manager and have discussed NPQH openly with them. A small number of school business managers have accessed and/or completed this programme. Support from the Association of School and College Leaders (ASCL), who recognise the possibility of experienced school business managers taking on the role of School Principal, may result in NPQH becoming a qualification that more school business managers undertake in the future. Findings from our national survey demonstrate that school business managers are interested in undertaking this programme.

Other NCSL provision

- 5.49.** NCSL also supports several programmes which are available to leadership teams and therefore to expert school business managers. These include:
- **Strategic Leadership of Information and Communication Technology (SLICT)** which is available to candidates and teams in the secondary sector at senior leadership level.
 - **Working Together for Success** which aims to build highly effective teams that will improve the working environment of schools and outcomes for staff, pupils and the school community. It enables members of the leadership team to develop their team-working skills and behaviours so they can create and lead more effective teams within the school and across schools.
 - **The Research Associate Programme** offers an opportunity for senior school leaders to engage in enquiry and undertake research that will impact on practice. NCSL states that this programme is primarily for headteachers or deputy and assistant headteachers but, 'exceptionally', those in other senior leadership roles may be considered. This recognition that there are senior leaders who are not teachers is resulting in some school business managers accessing this programme as a means to research best practice.

- 5.50.** There is an indication that a higher percentage of primary school business managers are accessing NCSL's CSBM and DSBM, whereas masters level academic programmes are attracting a greater number of secondary school business managers. It may be that these ratios of primary and secondary school business managers have been influenced through NCSL's recruitment criteria or it could be an indication of the level of recognised qualification and further professional development required in each phase. It could also be an indication of the number of emergent school business managers in each phase rather than a true reflection of the ratio of primary and secondary school business managers. These issues are examined thoroughly by NCSL's Impact and Evaluation studies.

Institute of Administrative Management

- 5.51.** The Institute of Administrative Management (IAM) externally validates both the CSBM and DSBM. CSBM graduates receive the Qualifications and Curriculum Authority accredited Diploma of Administrative Management and a one year membership of the IAM, whilst DSBM graduates receive the Advanced Diploma in Administrative Management and a one year membership of the IAM.
- 5.52.** The IAM also offers a Bachelor of Arts (Honours) Degree in Administrative Management through the Institute of Administrative Management, Management Development Partnership and Oxford Brookes University Business School. This professional qualification is not specific to school business managers but is available to CSBM and DSBM graduates as well as other school business managers who have the necessary qualifications and are associate members of the IAM.

The National Bursars Association

- 5.53.** The National Bursars Association (NBA) began developing a masters' level licentiate for advanced school business managers in 1997. They currently offer the Senior Bursar Development Programme which is available to experienced practising school business managers operating as integral members of the school leadership team. The programme provides personal and professional development through research of leadership whilst contributing to school improvement and learning and teaching. The Senior Bursar Development Programme awards:
- licentiate status of the National Bursars Association (LNBA)
 - a postgraduate certificate with 60 Masters level credits through the University of Leicester
- 5.54.** Participants must be members of the NBA in order to access the programme and will ideally hold the CSBM or DSBM, or an alternative professional qualification. This programme recruits two cohorts of fifteen candidates per year.
- 5.55.** The National Examination Board in Occupational Safety and Health (NEBOSH) National General Certificate in Health & Safety is also offered in partnership with the Rapid Results College who accredit the certificate. The NEBOSH National General Certificate is established as a leading award in basic health and safety held by more than 65,000 people. The programme is suitable for any staff with a health and safety remit.

- 5.56.** The NBA has also recently introduced a one day bursar induction course for new or recently appointed bursars. The course is delivered regularly in central locations nationally. There are no entry requirements and the course can be accessed by members and non-members. The programme is designed to:
- develop understanding of the full requirements of the school business management role, the education system and the role of governing bodies;
 - clarify training and development routes available for ongoing professional development
 - introduce the requirements of the FMSIS and other data information systems
 - introduce school initiatives affecting the role
 - raise awareness of how to access relevant information for networking, essential websites and regional groups, etc
- 5.57.** Finally, the NBA also hosts an annual two-day bursars conference, with keynote speakers and workshops covering topical issues.

The Association of School and College Leaders

- 5.58.** ASCL provides a wide range of courses relevant to the leadership team. They also have a Bursar Committee. They have purposely chosen not to provide specific school business manager training as they do not wish to 'step on the toes of the NBA'. They also believe that school business managers, as intrinsic members of the leadership team, will be well suited to the broad range of courses provided rather than restricting them to specific school business managerial roles. This approach is in line with their assertion that differentiation will not promote the school business manager role as well as an inclusive approach which assumes that school business managers are members of the leadership team.

Independent providers

- 5.59.** Stands for Education (SfE) has been working with and training school business managers for several years and along with the Regional Training Agency (RTA) specialises in providing training for support staff. Both provide areas on their websites that identify courses suitable for school business managers. None of the courses was specifically targeted to the role of the school business manager.
- 5.60.** Numerous courses are provided by independent companies which are aimed at school managers and the leadership team. These companies, by the very nature of being profit-making, need to provide courses which are suitable for a wider range of delegates. Where possible, therefore, they deliberately target a wider audience rather than specific categories of staff.

Professional development at the local level

Regional School Business Manager Groups

- 5.61.** Support groups of school business managers also meet at a regional level. Some work with their local authority and some operate independently of the local authority. These sessions may include guest speakers. An investigation of the NBA website, where recent regional sessions can be posted indicated that provision of these meetings is sporadic, with some areas being very active whilst others do not meet throughout the year. The North-East Bursar Group provides an annual conference for their region. This area of the research was inconclusive and further investigation is recommended to understand development opportunities at a local level.
- 5.62.** The NBA provides training workshops for these local school business management groups which cover a range of management competencies and are customised according to local requirements. The type of sessions provided is principally designed to develop management and leadership skills and include:
- presentation skills
 - appraisal skills
 - managing the poor performer
 - ensuring equality
 - managing teams
 - leadership skills
- 5.63.** The NBA and educational consultants operating throughout the country also provide one-day courses for all levels of school business management. These courses cover a similar range of topics to the workshops.

Local authorities

- 5.64.** A total of thirty internet local authority sites was visited to explore training provision for school business managers, but the search proved problematic as many of the sites do not provide access to information regarding training and development. There is clear evidence, however, that local authorities provide training programmes as 88 per cent of the national survey respondents indicated that they accessed them. Where information was available, there were indications that some local authorities provide support through regular school business manager meetings, either with the local bursar groups or as an authority service. These meetings generally focus on current issues and therefore operate as an information provision meeting rather than a development process. The agenda is usually set by the authority. Only one site included wide-ranging information and included the provision of an NVQ Level 3 in Administration, which could potentially be taken up by a school business manager.

5.65. This research was extended to contacting, by email, the chairpersons of the Regional NBA groups. The reaction to this has been disappointing as only three of the twelve responded. The responses received revealed little local authority support for the professional groups. One school business manager responded that their region had not met for over a year and that “LA training consists of them sending staff to bursars meetings when we invite them (usually one per meeting, two meetings per term over 6 terms).” Nevertheless, the LA officer tasked with implementing workforce reform in the authority “puts on an annual conference for bursars which is a mixture of updates on issues and personal development.” A second authority provides regular seminars, but the responding school business manager was unaware of any specific training for school business managers, although s/he knew that the training officer pro-actively encourages school business managers to do the CSBM/DSBM. A neighbouring authority was also proactive in this field. The final respondent commented: “The region does very little, I am afraid. The LEA does the minimum and they never get together”. This research, however, does not prove that local authorities do not provide training, only that it is difficult to access the information regarding any training provision outside the normal local authority communications to their schools.

Professional associations

5.66. School business managers are members of a wide range of professional associations both as a result of their previous career experience and in response to training and expertise required in the post. Consequently they are members of finance, administration, secretarial, management, marketing, personnel, facilities and health and safety associations. The numbers of professional associations which demonstrate a high awareness of school business managers and their roles and accept them as members are also increasing. The Institute of Administrative Management, Institute of Leadership and Management and College of Teachers all recognise and support the CSBM and DSBM, whilst the Association of School and College Leaders (ASCL) includes ‘bursars’ in its list of eligible members and on its council (ASCL, 2006). The National Association of Headteachers (NAHT) has also recently agreed to allow school business managers to join its ranks.

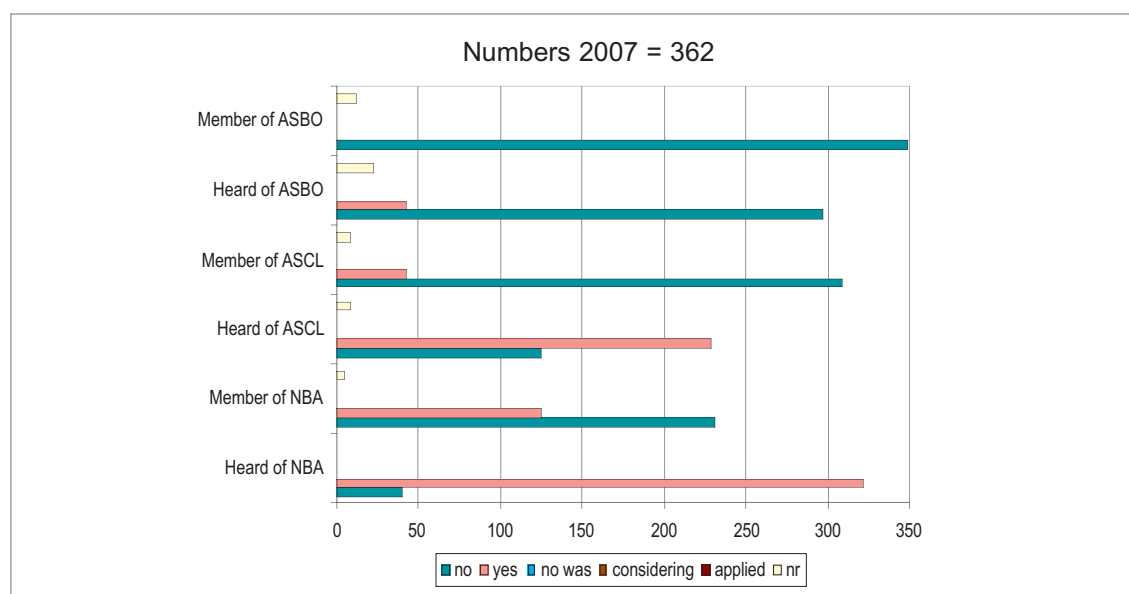


Chart 5.11: Relationship with major school business management professions 2007

- 5.67.** The principal associations specific to school business managers in the state sector are the National Bursars Association (NBA), which is now more than ten years old, and ASCL which used to be called the Secondary Headteachers Association but has widened its membership in recognition of 'a significant shift in perception is needed to move from the image of the all powerful head to that of an institution with a team of leaders' (PriceWaterhouseCooper, 2006:8). Membership of ASCL is, therefore, available only to secondary phase school business managers, whereas the NBA accepts membership from any phase and from the private sector. Membership of a professional association is not compulsory. These associations do not control entry into the profession nor do they specify training and professional update requirements that are the characteristics of most professional associations, consequently, not all school business managers who have heard of these associations are members (Chart 5.11).
- 5.68.** At an international level, some school business managers are aware of and members of the US Association of School Business Officials (International) (ASBO International). This association contributed to the development of the school business management standards currently accepted by the profession. ASBO International was founded in 1943 and members are located in the USA, Canada, South America, Europe, Australia and South Africa. Few school business managers had heard of ASBO International and only one was considering membership.

Conclusions

- 5.69.** School business management is an emerging profession in the state sector and as such, there is no preferred entry route nor is there a minimum entry qualification requirement and membership of a professional association is not compulsory. Nevertheless, four major entry routes into school business management are emerging via finance, the education sector, local government and the civil service and industry. Finance and/or an educational background are becoming the preferred entry routes. A debate about career progression and salaries is also taking place and hence different levels of school business management are becoming clearer and a professional development framework is being developed that is supported by the TDA, NCSL and CfA working together and by universities that are providing increasing numbers of higher academic routes. Nevertheless, movement and promotion within the profession is still limited. Imposed changes in salary levels are currently causing unrest through the inappropriate application of single status agreements and job evaluation exercises, although school business managers are also beginning to renegotiate these with their headteachers, governing bodies and local authorities.

- 5.70.** The provision of specific school business manager development qualifications and programmes is largely restricted to the NCSL's Bursar Development Programme with small-scale programmes offered by the NBA and a few HE institutions. The TDA, however, is exploring ways to share knowledge of qualification provision for all school staff that will also benefit business managers. They have also been developing a career development framework for school support staff that includes information useful to school business managers and explains NVQ equivalency. There are opportunities for school business managers to participate in more generic leadership training and qualifications and it could be argued that if school business managers are to become principals of the future, then this type of qualification is appropriate. This leadership training is also important in developing consultant business management leaders who can work with schools and support school business management training programmes.
- 5.71.** The provision of support and training by local authorities is both patchy and of dubious value, with the few respondents providing mainly negative feedback. This area of the research lacks robust data, with much of the information being hearsay rather than based on empirical evidence. There are other courses provided by training providers which are available and relevant to school business managers' current practice which provide practical support.
- 5.72.** An area of development and support that has been missing is the induction of school business managers to the profession. The Independent School Bursars Association (ISBA) has provided regular two-day conferences for newly appointed bursars and a mentoring programme between experienced bursars local to the newly appointed. Recently, both the NBA and NCSL have introduced induction programmes for new school business managers, although they do not include mentors.
- 5.73.** In 2004, there was clearly a two-tier profession with men being paid more and holding higher status titles and better qualifications. Women, however, are now improving their qualification levels, demonstrating their professionalism and arguing for titles that represent the new roles they are adopting. The best school business managers, however, are not characterised by their gender but by their professionalism. It is those school business managers who take responsibility for their role and professional development, set themselves goals that push the boundaries of the profession and improve their effectiveness who reap the rewards of higher salary, higher status and, more importantly, greater job satisfaction.