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Approaches to evaluation, particularly in terms of a programme's impact in complex and varied settings, have developed a great deal over the last 40 or so years. Early approaches based upon experimental methods, as outlined in Campbell and Stanley (1963), where pre-test and post-test approaches are deployed with control and experimental groups and the allocation of participants to each group is made on a randomised basis, have been criticised for their underlying assumptions. Causality in educational and social research has been recognised as a complex process and often one which cannot be easily or simply determined. Other, more naturalistic approaches have been acclaimed as more sensitive to contexts and generative of better and richer understandings of how particular situations are seen and constructed by their participants. More recently, understandings taken from the study of chaos and complexity have led evaluators to appreciate that in many situations, even if the same curriculum were taught by the same teacher to the same group, identical outcomes could not be guaranteed because of the potential impact of slight variations in initial conditions. Against such a background, schools present arenas where there is much messiness in terms of context, conditions and influences, so that simple linear predictions of what might happen or what works will vary from site to site.

Pawson and Tilley (1997) present eight statements aimed at developing methodological processes within evaluation. We think it will be helpful to the reader if we expound these very briefly here, specifically relating their precepts to how we have designed and conducted this evaluation of the BDP.

Their first point is about *generative causation*. They do not expect causation to be understood externally in terms of a simplistic A-causes-B view, but in terms of the roles of different stakeholders who make programmes work in appropriate circumstances. In our approach, we were concerned to understand the needs and attitudes of the many and various stakeholders in the BDP. So this will have included political imperatives coming to bear on NCSL; attitudes of contracted providers to how aspects of the programme should be run; interests and willingness on the part of tutors to meet varied candidate needs; the candidates themselves and their enormously varied professional backgrounds, and the equally varied contexts in which they work.

The second of Pawson and Tilley's points concerns what they term *ontological depth*, which means that we as evaluators need to get beneath the surface of what can be seen as inputs and outputs of the programme. Essentially this means that programme outcomes are generated by both micro- and macro-scale social forces since programme interventions are always embedded in a range of social processes and contexts. In professional situations like that for the BDP, this involves understanding the choice-making possibilities of individuals and stakeholders. How a programme initiative works and develops will be affected very specifically by the situations of individual participants – in our case principally, but not exclusively, bursars. When this is further unpacked, or the layers are peeled back, we need to recognise that not only are individual bursars different, as are their work contexts, but so are their headteachers, colleagues and – in terms of the BDP – their tutors and assessors.

Third are *mechanisms*. Evaluators seek to understand why a programme works in terms of the mechanisms which operate leading to behaviours. Courses such as the BDP's are prolonged encounters and the evaluators' task is to discern the extent to which programme mechanisms have solved the original problem. But in the process may have raised new issues, unforeseen at the outset. In this respect we have recognised interesting potential outcomes of the course in terms of bursars taking over administrative responsibilities from headteachers (as a response to the initial concern to help alleviate heads heavy workloads), but have also encountered situations where headteachers are reluctant to deploy fully the skills and competences which their bursars have developed as a result of the BDP courses.

Fourth is the central aspect of *context*. Evaluators are interested in understanding 'for whom and in what circumstances'. The contingency of context is of crucial importance. Participants can only relate to and act upon the resources and opportunities provided by a course if the settings are conducive. In our evaluation, we have been concerned, where possible, to identify different sub-groups of participants based upon their professed successes, satisfactions or failures, with a view to better understanding what has been beneficial to whom in particular circumstances. In the BDP this will become manifest through different groups of bursars we have identified from elements within self-report questionnaires, from satisfaction surveys and from interviews with bursars, headteachers and tutors.

Fifth are *outcomes*. Our job has been to understand the key outcomes from the BDP initiative and to perceive these not as undifferentiated wholes but as multiple outcomes stemming from different people in different circumstances. Two key examples spring to mind from the BDP experience: first the varied relationships between bursars and their headteachers, and second the different ways in which bursars from different backgrounds have reacted to the programme and its materials.

Sixth are CMO *configurations*. Rather than operating in a circular fashion, where a conjectured configuration is a starting point and a refined one is the outcome of the evaluation process, our task has been to see how known or expected outcomes can be more finely tuned for newer and emerging circumstances. In terms of the BDP, this has happened in relation to the development of new aspects of the programme; developments of overall course structure; perceptions of how some, but not all, graduates from BDP courses may wish, and be able, to progress further; and how some of the benefits of the course could be further embedded in the leadership development work of NCSL.

Seventh in Pawson and Tilley's criteria are what they call *teacher-learner processes*. Briefly this involves developing a reciprocal relationship with stakeholders, bearing in mind that they are implicated in the programme and its development.

The last of Pawson and Tilley's key points is that of *open systems*. Programmes such as the BDP have been implemented in a changing social world where the new or unexpected may intrude in unanticipated ways. As evaluators, we have to be sensitive to such possibilities and the impacts they may have on programmes such as the BDP. Examples of such within our short time of association with the BDP could include the promulgation of Every Child Matters, the major expansion of the school workforce in terms of support staff, and the growing problem of succession planning within school leadership where previously bursars were not seen to have any real part to play.

We share Pawson and Tilley's view that the 'strength of evaluation research depends upon the perspicacity of its view of explanation' (p 219) and hope that our work for the BDP has enabled all key stakeholders to understand better how the programme is working, for whom and in what circumstances.

We would be grateful if you would complete this evaluation of this training session before you leave.

Name:

Gender (delete as appropriate): Male / Female

School phase: (tick as appropriate) Primary ☐ Secondary ☐ Special ☐ Sixth form ☐ FE ☐

Local authority ☐ Other (please specify)

Date:

Venue:

Tutor(s):

Grading

Please answer the questions below using the grade descriptors. Please circle the number that most closely reflects your view.

	Strongly agree		Strongly disagree	
1. The training is meeting my personal career development needs.	1	2	3	4
2. The training will make a significant contribution to my professional practice.	1	2	3	4
3. The training materials used were of high quality.	1	2	3	4
4. The tutors were effective in delivering the training.	1	2	3	4
5. The training was well organised.	1	2	3	4
6. The tutors provided support and guidance to sustain the motivation and learning of the group.	1	2	3	4
7. The venue was fit for purpose.	1	2	3	4
8. The bedroom accommodation was of a good standard.	1	2	3	4
9. There were effective administrative arrangements prior to the residential session.	1	2	3	4
10. The online training on talk2learn and the Learning Gateway were led effectively.	1	2	3	4

What was the most effective part of the course for you?

What could be changed or improved in the course?

Any other comments that you think would be helpful?

Telephone surveys

We will conduct a small-scale telephone survey to complement these feedback sheets. Please indicate whether you would be willing to participate, and enter your preferred contact number below.

Take part in telephone survey? Yes ☐ No ☐

Preferred contact number

Thank you for taking the trouble to complete this evaluation. Your views are important and every sheet is read carefully.

We would be grateful if you would complete this evaluation of this training session before you leave.

Name:

Gender (delete as appropriate): Male / Female

School phase: (tick as appropriate) Primary ☐ Secondary ☐ Special ☐ Sixth form ☐ FE ☐

Local authority ☐ Other (please specify)

Date:

Venue:

Tutor(s):

Grading

Please answer the questions below using the grade descriptors. Please circle the number that most closely reflects your view.

	Strongly agree		Strongly disagree	
1. The training is meeting my personal career development needs.	1	2	3	4
2. The course is making a significant contribution to my professional practice.	1	2	3	4
3. The training materials used were of high quality.	1	2	3	4
4. The tutors were effective in delivering the training.	1	2	3	4
5. The training was well organised.	1	2	3	4
6. The tutors provided support and guidance to sustain the motivation and learning of the group.	1	2	3	4
7. The problem-solving activity was effective in supporting my learning.	1	2	3	4
8. The one-to-one tutorial was helpful in terms of planning further work for my case study project.	1	2	3	4
9. The venue was fit for purpose.	1	2	3	4
10. The bedroom accommodation was of a good standard.	1	2	3	4

	Strongly agree		Strongly disagree	
11. There were effective administrative arrangements prior to the residential session.	1	2	3	4
12. My participation in talk2learn is providing me with effective support as I progress through the course.	1	2	3	4
13. My tutor has provided me with constructive feedback by email or telephone to guide me effectively through the course.	1	2	3	4

What was the most effective part of the course for you?

What could be changed or improved in the course?

Any other comments that you think would be helpful?

As part of our quality assurance procedures the course manager will follow up with short telephone calls to a small number of candidates. Are you prepared to take part in a telephone conversation for this purpose? If so please enter your details below.

I am / am not prepared to take part in a telephone call for quality assurance purposes.

My preferred telephone contact number is

Signed

Thank you very much for completing this evaluation form.

Complexity and presentation of information

One of the main problems with the presentation of the CSBM course is that the assessment (and related pedagogy) is very complex and the information about that complexity is presented in a way that is very confusing.

This confusion lies in the presentation of both overall course information and, in particular, information about the assessment. This is especially of concern given the nature of the target group, many of whom are adult returners to learning. It is well documented that adult returners to learning often bring negative baggage from previous learning experiences, resulting in a lack of self-belief and confidence, and an in-built fear of being assessed and of being wrong. There is a strong possibility that where information is confusing, candidates will blame their own lack of comprehension rather than the course documentation, and will become demoralised and demotivated; this in turn is likely to lead to non-completion.

- Part of the confusion arises from the fact that conflicting information and guidance is given within the various documentation (such as the candidate handbook) and it is difficult to tell which document should be considered as the definitive course document. This must be confusing for candidates, and caused difficulties for the review of the course and the assessment process.

Clarity of information for candidates must be of paramount importance, and the document which candidates would logically understand to be the definitive course document is the candidate handbook. Hence, for the purposes of this review, the candidate handbook was taken as the key reference document and it has been assumed that the information given in the candidate handbook should be clear, unambiguous and cross-referenced accurately with information provided elsewhere. (All page references given within the review will refer to the candidate handbook unless otherwise indicated.)

- All key documentation should be found in the candidate handbook; candidates should not have to hunt elsewhere.

The *Candidate Evidence Grid* is a key document which candidates are required to use to indicate where they feel they have met the first set of competences underpinning the course; it forms the basis for the assessment of a key element of the course. It can be downloaded from the programme website but should also be provided within the candidate handbook.

- Similarly, all key course information should be found in the candidate handbook; candidates should not have to hunt elsewhere. The candidate handbook should clearly state all the competences or learning outcomes which form the basis for the assessment tasks needed to achieve the CSBM.

The candidate handbook states that

the programme draws upon two sets of competences in school business management that have been developed by experts on school business management in association with practising school business managers. The first set of competences relates to the SBM module that runs through the programme ... The second set of competences is related to specific areas of responsibility in SBM ... These competences will help you to assess your current level of expertise ... They also underpin all of the assessment tasks needed to achieve the CSBM.

However, whereas the first set of competences is outlined on p 5 of the candidate handbook, the others are only provided in the separate handbooks for the seven smaller modules, where they are in fact referred to as ‘learning outcomes’.

- There is no clear guidance to candidates as to the course size and structure. The overall workload is not given, nor the weighting of individual modules indicated.
- There is confusion over language used in the course documentation: different terms are used to refer to the same thing; individual terms are used with different meanings in different places.

Examples include the use of the word ‘module’. A repeated source of confusion lies in the fact that although the main module of the course is the SBM module (p 3), the term ‘module’ is frequently used to refer only to the seven online modules (p 18 and Assessment of module, p 40). This confusion in relation to the assessment is clearly of especial importance since candidates could be misled as to whether ‘module entries’ (p 20) and ‘module summaries of learning’ (p 23) apply only to the seven small modules that lie alongside the SBM module, or also to the SBM module itself. For example, mention of exclusion from the need for module entries and module summaries (p 24) refers only to the environment module thus: ‘All modules except environment (optional)’.

Elsewhere, ‘module’, ‘unit’ and ‘section’ are used interchangeably.

‘Competences’ and ‘learning outcomes’ are also used interchangeably in places. The course introduction says that ‘Each [of the seven remaining modules] is broken down into a number of standards, which in turn are broken down further into a number of competences’; within the module booklets the term ‘learning outcomes’ is used in place of ‘competences’ and the term ‘standards’ does not appear.

- There are a number of inaccuracies in language usage. These are largely errors of typescript and spelling and are easily remedied.

Complexity of structure – course

Representation of course structure

The overall structure of the course is presented on p 7 of the candidate handbook, together with a description of the activities which form part of the course. However, the structure as laid out in the diagram is not clear, for example in the use of bold and non-bold text and choice of titles of phases of the course.

A clearer representation of the current structure might be as follows:

Pre-course diagnostic	
Phase 1 Two-day face-to-face at assessment centre Online work	
<ul style="list-style-type: none"> • Course induction – programme overview • SBM module – phase 1 	<ul style="list-style-type: none"> • Risk management module • ICT management module
Phase 2 Two-day face-to-face residential Online work	
<ul style="list-style-type: none"> • SBM module – phase 2 • Facilities management module 	<ul style="list-style-type: none"> • Office systems management module • Human resources management module
Phase 3 Two-day face-to-face residential Online work	
<ul style="list-style-type: none"> • SBM module – phase 3 • Financial management module 	<ul style="list-style-type: none"> • Environmental management module
Assessment One-day face-to-face at assessment centre	
<ul style="list-style-type: none"> • Interview • Presentation 	<ul style="list-style-type: none"> • Discussion

The element of work missing from this representation of course structure but included in the original is the assessment. However, the representation (p 7) of the timing of the leadership learning portfolio (LLP) within the diagram (ie after the SBM module, phases 2 and 3) is at odds with information given within the section dealing with the LLP (pp 10ff) and thus the representation needs to be revised to provide consistent information. Similarly, on p 7 the assessment activity at an assessment centre is described as ‘interview and presentation or discussion’; on p 33 the description of the ‘case study presentation and discussion with assessors and fellow candidates’ states that the assessment involves a ‘10-minute, timed presentation ... followed by discussion with the members of your audience including the assessors’.

Relative weighting of course components

The relative weighting of the various modules of the course is not transparent in the candidate handbook. The handbook points out that the SBM module ‘runs through the programme’ (p 3) but the weight or importance of this module compared to the other seven modules is not clear.

Part of the confusion lies in the fact that whereas a timetable is given showing the precise allocation of time to various components of the course during the face-to-face residential, the information about online learning is much less precise. Reference is made to elements of the online learning, but further clarification would be very beneficial to the candidates, who are unlikely to bring previous experience of participation in blended learning. The elements mentioned are:

- module diagnostics – which are ‘available electronically on the Learning Gateway’ (p 18) but apparently completed face-to-face
- learning activities (p 19) – which again are available online but should be completed offline
- online tests (p 20) – which are a required element but which do not appear in the outline of assessment components (see below)
- module entries and module summaries of learning – which form components of the assessment strategy
- talk2learn online hotseats (p 25) – which seem to provide general contextual understanding to underpin other work, but which are not described in detail in the candidate handbook
- the learning community (p 25) – which again provides a means to network, but appears not to be central to the learning and teaching strategy for the programme

Without further detail as to the weight, notional learning time and place of online learning within the learning and teaching strategy on the course, candidates are likely to see the use of

face-to-face contact time as the prime indicator of the relative weighting of the various elements of the course.

The impression given by considering the allocation of time in the face-to-face workshops is as follows.

Workshop 1

Element of the course	Times allocated	Total time
SBM 1	1.75, 1.5, 1.25, 1.5, 0.5	6.5
Risk management	1.5	1.5
ICT management	1.5	1.5
General programme time	1, 1	2.0
Total time		11.5 hours
Module time		9.5 hours (SBM – 6.5)
Other		2 hours

Workshop 2

Element of the course	Times allocated	Total time
SBM 2	1.25, 1, 1, 2, 1.25	6.5
Facilities management	1.25	1.25
Office systems management	1.25	1.25
Human resources management	1	1
General programme time	1.5	1.5
Total time		11.5 hours
Module time		10 hours (SBM – 6.5)
Other		1.5 hours

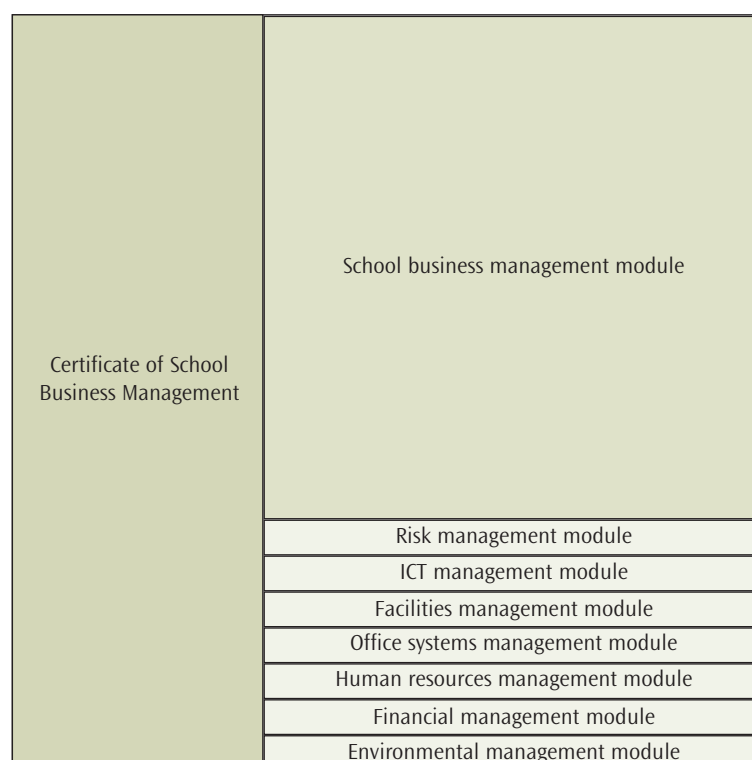
Workshop 3

Element of the course	Times allocated	Total time
SBM 3	1, 1, 1, 1.75, 1.25	6
Financial management	1.5	1.5
Environmental management	1.5	1.5
Human resources management	1	1
General programme time	2	2
Total time		11 hours
Module time		9 hours (SBM – 6)
Other		2 hours

Overall, the allocation of time during face-to-face modules is:

Total face-to-face workshop time	34 hours
General programme time	5.5 hours
Total module time	28.5 hours
SBM module	19 hours
Other modules	9.5 hours for 7 modules = c 1.33 hours per module

Thus, according to an analysis of the allocation of face-to-face time, the SBM module accounts for roughly two-thirds of course face-to-face contact time and all seven other modules are roughly one-third of course time, as illustrated by the proportions in the diagram below:



Complexity of structure for assessment

The assessment strategy for the CSBM course is complex, comprising a multiplicity of both separate and inter-dependent elements. The presentation of this strategy is both complex and confusing.

The complexity arises largely because the assessment strategy appears to approach the assessment from a number of different perspectives, as follows.

- Elements such as the case study and the presentation involve candidates in authentic or semi-authentic activities related directly to their professional work which provide a basis for competence-based or learning outcome-based assessment of the 10 broad competences noted on p 4.
- The multiplicity of components within the LLP seems to reflect a content-based approach, assuming the requirement for candidates to evidence coverage of course content.
- Elements of assessment such as reflections within the learning review element of the LLP (in particular reflections on 'talk2learn online contributions', p 39) suggest an approach to assessment designed to promote a particular approach to the learning on the course. Reflection encourages candidates to develop skills as reflective practitioners. The requirement to include a record of online contributions promotes participation in an aspect of learning activity which is seen as beneficial but which is otherwise outside candidates' previous learning experience.

Each of these approaches has merits in itself. However, the combination results in a complexity of assessment which in itself could contribute to problems with rates of retention and completion, especially if not presented in a simple and straightforward fashion.

As in the case of the complexity of course structure, this is of particular concern given the target audience for this course. As stated above, non-traditional learners often have particular anxieties about assessment, because of bad experiences in the past. They would benefit from both simplification of the assessment process itself and clarification of the way in which it is presented in the candidate handbook.

Elements of assessment

The assessment section of the candidate handbook (pp 39–52) states that ‘there are four major elements to the assessment of CSBM’ (p 39):

- leadership learning portfolio (which comprises a number of elements)
- case study of 3,500 words
- personal interview lasting 30 minutes
- case study presentation of 10 minutes, followed by discussion

However, this list masks underlying complexity. The LLP itself comprises a large number of elements and these elements are described differently in the LLP on pp 10–27 and in the outline of the portfolio on p 39. The same elements are included, but the grouping and description of these elements is different.

Further confusion arises from the presentation of the assessment of modules. Elements for the assessment of the seven modules that lie alongside the SBM module within the complete qualification are contained within the list of components of the LLP. However, on p 40 they are presented as being a separate aspect of the assessment strategy. They appear in a section of their own, and only in the last sentence of this section is there a mention of their forming an element of the LLP: ‘The module summaries of learning are assessed and graded when you submit your LLP for assessment’ (p 41).

The assessment of these modules is itself quite complex, involving:

- ‘learning activities [which] are just that ... They are not marked or assessed by anyone although they can contribute to assessment by providing assessment’ (p 40)
- selected compulsory questions which are to be chosen and completed in line with the candidate’s Leadership Learning Portfolio (LDP) and justified within an assessed module entry required for each module
- ‘a module summary of learning [which] is required as an assessed piece of writing upon completion of each module’ (p 41)

The seven modules also involve compulsory online tests which must be passed with a minimum mark of 80 per cent. However, these tests are not mentioned in the description of the module assessment.

Each element of module assessment is handled in a different way from the others, and this is an additional element of complexity, exemplified by the case of the module summaries of learning: these are ‘the assessed element, supported by the non-assessed but verified evidence of learning and ... assessed by an assessor (not your tutor)’ (p 41).

When we consider the lack of confidence about assessment which often forms a barrier to learning in the case of adult learners, it is clear that the course would benefit from significant simplification and clarification in the area of assessment, to make the assessment more understandable and accessible and thereby improve rates of retention and completion.

Workload and assessment tariff

The complexity of the assessment process makes it difficult to calculate the overall assessment tariff for the course. The guidance material downloaded from the NCSL website (*Guidance – Word Count and Tasks for Completion and Assessment (candidate)* v1.1 03/11/05) does not provide candidates with an overall word count, but calculation of the individual component word counts provided suggests a total of 8,300–11,000 words plus case study proposal and PDP entries.

It would be helpful if this summary, with the overall total, were provided within the candidate handbook. Attention needs to be given, too, to some contradictory information – for example the module summaries of learning are given as being under 600 words on p 24 and p 42, but as 250–500 words on p 50.

Cost of the assessment process

The cost of the current assessment process is high on two counts.

- The amount of work and number of elements of assessment that have to be either assessed or verified, in line with the complex assessment strategy, means that tutors or assessors are required to read a large amount of material, which must be very time-consuming if done with care and attention.
- The current assessment process requires candidates to attend ‘a one-day event at an assessment centre’ (p 7) where two assessors are involved in the assessment of each candidate’s work (p 40). The 30-minute individual interview and the overall assessment could be restructured in a less costly way.

Level of course

The report of the Committee of Inquiry into Higher Education (Dearing, 1997) stressed ‘the importance of clear and explicit information for students so that they can make informed choices about their studies and the levels they are aiming to achieve’. A Framework of Higher Education Qualification (FHEQ) was established, placing higher education study within the broader National Qualifications Framework (NQF), and providing level descriptors which explain the expected achievements at different stages from first-year undergraduate (level 4, certificate level) through to PhD (level 8). In line with the code of practice of academic quality and standards in higher education, universities are expected to align their programmes of study with this framework and to describe their courses’ programme specifications.

Level 4 of the Quality Assurance Agency (QAA) FHEQ is also known as Certificate (C) level; achievement of 120 credits at this level leads to a Certificate of Higher Education. The amount of learning on the CSBM course does not equate to 120 credits but the competences (p 4), module learning outcomes (given within individual module booklets, but not within the candidate handbook) and assessment criteria (p 49) are broadly in line with level 4 of this framework.

QAA documentation states that students awarded credit at this level should demonstrate the following.

- i) knowledge of the underlying concepts and principles associated with their area(s) of study, and an ability to evaluate and interpret these within the context of that area of study
- ii) an ability to present, evaluate, and interpret qualitative and quantitative data, to develop lines of argument and make sound judgements in accordance with basic theories and concepts of their subject(s) of study

Typically, (they) will be able to:

- a) evaluate the appropriateness of different approaches to solving problems related to their area(s) of study or work
- b) communicate the results of their study or work accurately and reliably, and with structured and coherent arguments
- c) undertake further training and develop new skills within a structured and managed environment

and will have:

- d) qualities and transferable skills necessary for employment requiring the exercise of some personal responsibility

Examples of alignment of course competences (p 4) with this level would be:

SBM3: Analysis

The competent SBM understands the context of school business management and is able to analyse their professional role and learning in the light of the emerging needs of the school.

SBM9: Communication

The competent SBM is able to communicate effectively in various ways according to the needs of various audiences and settings.

Examples of alignment of assessment criteria (p 49) with this level would be the following samples from the criteria descriptors for a grade 2 basic pass and grade 3 intermediate pass:

2A – has carried out delegated tasks in relation to this key aspects of SBM with little or no direction from another

3C – has made significant progress in learning about this aspect of SBM and how it applies in school

Course providers might like to consider structuring the overall course as a University Certificate – 60 credits at level 4, one of the nationally-recognised ‘other accessible awards’ recognised within the FHEQ and described as ‘smaller, highly accessible qualifications which are generally taken by those who are returning to higher education, particularly in the context of work-based learning’ (Credit and Qualification Framework for Wales et al, 2001:15).

The overall assessment tariff is roughly appropriate to a 60-credit course and course, and module learning outcomes could be reviewed and revised to ensure consistency with the level and structure of the University Certificate:

Qualification	Relevant HEQF qualification level	Minimum overall credits	Range of levels; number of credits at highest level	Maximum credits at lowest level
University Certificate	C	60 credits	Levels (3), 4 min 40 credits at level 4	max 20 credits at level 3

Constructive alignment – guidance to students on what they have to achieve and how they can achieve it

Within higher education practice, where courses are constructed on a modular basis, it is the norm for course outcomes to be mapped to module outcomes. This enables participants to see the way in which the work they do within individual modules, and the learning outcomes they achieve within the assessment of those modules, contribute to their progress and achievement against the overall course outcomes on which the award of the related qualification is based. The CSBM course presents itself as being modular in nature but in terms of the competences to be achieved, there is no clear mapping from course to modules so the linkages are not clear for candidates.

- The competences stated as underpinning the learning and assessment of the complete CSBM course should be mapped to the learning outcomes of the individual modules within the course. This is not the case, even for the SBM module – the learning outcomes for this module (given on p 6 of the SBM module booklet) do not relate clearly to the set of competences outlined on p 5 of the candidate handbook, though the handbook clearly states that ‘The first set of competences relates to the SBM module that runs through the programme.’
- The principle of constructive alignment underpins the move to a student-centred approach to learning, teaching and assessment within higher education. The learning outcomes which form the basis of the assessment should be mapped to the assessment tasks through which they will be assessed:

The basic premise of the whole system is that the curriculum is designed so that the learning activities and assessment tasks are aligned with the learning outcomes that are intended in the course. This means that the system is consistent.

Higher Education Academy, undated

Within the CSBM course little guidance is given to candidates as to how course level competences are mapped to the various elements of assessment.

Candidate progress and achievement

All assessment is end-weighted. This is likely to lead to non-completion and to be demotivating for learners. It would be more motivating for learners to be assessed at various stages of the course, and so to have evidence of their progress and likelihood to achieve overall. The course itself is structured around three phases of delivery; assessment could be restructured to correspond with these three phases, which in themselves could be structured as three modules of the course.

Conclusion and recommendations

The review has been undertaken with particular regard to the nature of the target group as adult returners to learning. It is well-documented that adult learners often bring negative baggage from previous learning experiences when they embark on second-change learning, resulting in a lack of self-belief and confidence, and an in-built fear of being assessed and of being wrong. There is a strong possibility that where information is confusing, the candidates will blame their own lack of comprehension rather than the course documentation and will become demoralised and demotivated; this in turn is likely to lead to non-completion.

- Clarification of information provided to candidates is of paramount importance, with particular attention to the provision of a clear, comprehensible candidate handbook, providing:
 - all key course information and necessary documentation
 - all competences or learning outcomes forming the basis for assessment
 - clear guidance as to course structure, overall study or work load and the weighting of individual modules
- The language used in the course documentation should be revised to ensure consistent use of terminology and correction of inaccuracies in typescript and spelling.

- Candidates would benefit from more information about the nature of the online learning on the course, showing the:
 - weight of online learning in relation to face-to-face contact time
 - notional learning time involved
 - role of online learning within the overall learning and teaching strategy
- Candidates would benefit from simplification of the assessment strategy, with fewer component elements, a more straightforward assessment process and clearer presentation in the candidate handbook.
- The cost of the current assessment process could be reduced through a simpler assessment structure, including removal of the requirement that candidates attend a full day at an assessment centre.
- The CSBM course could be structured as a University Certificate through a review to ensure that the learning outcomes, assessment and learning load are appropriate for 60 credits at level 4 of the FHEQ.
- The CSBM course presents itself as being modular in nature. As such the competences underpinning the learning and assessment of the complete course should be mapped to the learning outcomes of the individual modules.
- The learning outcomes which form the basis of the assessment should be mapped to the assessment tasks through which they will be assessed.
- All assessment is currently end-weighted. Assessment could be restructured to correspond with the three phases of course delivery, which in themselves could be structured as three modules of the course.

Shirley Bennett

Institute for Learning, University of Hull

We would be grateful if you would complete this evaluation of your training before you leave:

If working in a cluster please tick here ☐

School phase: (delete as appropriate) Primary / Middle / Secondary / Other (please specify):

Date(s):

Time:

Venue:

Tutor(s):

Title of session or unit:

Your ID number (for reliability analysis only)

Please respond to the items below, which are designed to evaluate your perceived levels of knowledge and skill as you begin the course. Each item requires two responses. In the first column please indicate your perceived level of knowledge, where 1 is a very low level and 6 means you feel you know a great deal about this. For the level of confidence column, please use 1 where you don't feel confident and 6 where you feel very confident.

Financial management	Knowledge level						Confidence level					
Approaches to school budgeting	1	2	3	4	5	6	1	2	3	4	5	6
Principles of accounting	1	2	3	4	5	6	1	2	3	4	5	6
Auditing and financial reporting	1	2	3	4	5	6	1	2	3	4	5	6
Cash management	1	2	3	4	5	6	1	2	3	4	5	6
Investment and debt management	1	2	3	4	5	6	1	2	3	4	5	6
Purchasing procedures	1	2	3	4	5	6	1	2	3	4	5	6

Human resources management	Knowledge level	Confidence level
Staff development procedures	1 2 3 4 5 6	1 2 3 4 5 6
Labour relations	1 2 3 4 5 6	1 2 3 4 5 6
Collective bargaining	1 2 3 4 5 6	1 2 3 4 5 6
Payroll procedures	1 2 3 4 5 6	1 2 3 4 5 6

Information and communications technology	Knowledge level	Confidence level
ICT in the provision of integrated learning systems	1 2 3 4 5 6	1 2 3 4 5 6
Use of management information systems	1 2 3 4 5 6	1 2 3 4 5 6

Facilities management	Knowledge level	Confidence level
Facility planning procedures	1 2 3 4 5 6	1 2 3 4 5 6
Maintenance and operation procedures	1 2 3 4 5 6	1 2 3 4 5 6
Estate management	1 2 3 4 5 6	1 2 3 4 5 6
Vehicle and transport management	1 2 3 4 5 6	1 2 3 4 5 6
Catering services procedures	1 2 3 4 5 6	1 2 3 4 5 6
Supply management procedures	1 2 3 4 5 6	1 2 3 4 5 6
Fixed asset management procedures	1 2 3 4 5 6	1 2 3 4 5 6

Risk management	Knowledge level	Confidence level
Health and safety procedures	1 2 3 4 5 6	1 2 3 4 5 6
Risk management procedures	1 2 3 4 5 6	1 2 3 4 5 6
Loss prevention procedures	1 2 3 4 5 6	1 2 3 4 5 6

Administration and support services management	Knowledge level						Confidence level					
Organisation and management models	1	2	3	4	5	6	1	2	3	4	5	6
Evaluation procedures for business services	1	2	3	4	5	6	1	2	3	4	5	6
Communication procedures	1	2	3	4	5	6	1	2	3	4	5	6

Education enterprise theme

We are interested only in how you rate your knowledge level on these items, where 1 represents a low level of knowledge and 6 is a very high level of knowledge.

Item	Knowledge level					
Management of the school	1	2	3	4	5	6
Resources for a safe, efficient and effective learning environment	1	2	3	4	5	6
Mobilising community resources	1	2	3	4	5	6
Legal aspects of education management	1	2	3	4	5	6
Contribution to the vision and mission of the school	1	2	3	4	5	6

Any other comments that you think would be helpful?

Telephone surveys

We may be conducting a small number of telephone and email surveys to complement these feedback sheets. If you would be willing to participate, please enter below your preferred contact number and times when it's most convenient for us to call you.

Name:

Gender (delete as appropriate): Male / Female

Table A5.1: Mean scores for items in the *knowledge* scale (n=282)

	Mean	Std deviation
Knowledge about approaches to school budgeting	4.495	1.1964
Knowledge about principles of accounting	4.232	1.1450
Knowledge about auditing and financial reporting	4.370	1.1866
Knowledge about cash management	4.890	1.0946
Knowledge about Investment and debt management	3.137	1.3365
Knowledge about purchasing procedures	4.949	1.1526
Knowledge about staff development	3.434	1.2475
Knowledge about labour relations	3.049	1.3210
Knowledge about collective bargaining	2.252	1.2275
Knowledge about payroll procedures	3.563	1.4961
Knowledge about ICT in the provision of integrated learning systems	3.224	1.1710
Knowledge about ICT in the maintenance and development of systems	2.993	1.1871
Knowledge about use of management information systems	4.205	1.2967
Knowledge about facility planning procedures	2.815	1.2860
Knowledge about maintenance and operation procedures	3.052	1.2039
Knowledge about estate management	2.735	1.3298
Knowledge about vehicle and transport management	2.317	1.3525
Knowledge about catering services procedures	2.663	1.3263
Knowledge about supply management procedures	3.296	1.4705
Knowledge about fixed asset management procedures	2.749	1.3208
Knowledge about health and safety	3.100	1.1617
Knowledge about risk management procedures	2.936	1.1944
Knowledge about loss prevention procedures	2.738	1.1900
Knowledge about organisation and management models	3.693	1.2449
Knowledge about evaluation procedures for business services	3.045	1.1833
Knowledge about communication procedures	4.063	1.1349

Table A5.2: Mean scores for items in the *confidence* scale (n=282)

	Mean	Std deviation
Confidence in approaches to school budgeting	4.391	1.2977
Confidence in principles of accounting	4.102	1.3354
Confidence in auditing and financial reporting	4.234	1.3219
Confidence in cash management	4.825	1.1835
Confidence in investment and debt management	3.026	1.4352
Confidence in purchasing procedures	4.923	1.1772
Confidence in staff development	3.244	1.3095
Confidence in labour relations	2.921	1.3196
Confidence in collective bargaining	2.154	1.2310
Confidence in payroll procedures	3.460	1.5015
Confidence in ICT in the provision of integrated learning systems	3.195	1.2709
Confidence in ICT in the maintenance and development of systems	2.951	1.2114
Confidence in use of management information systems	4.132	1.3620
Confidence in facility planning procedures	2.744	1.2803
Confidence in maintenance and operation procedures	2.970	1.2453
Confidence in estate management	2.684	1.3421
Confidence in vehicle and transport management	2.292	1.3131
Confidence in catering services procedures	2.648	1.3641
Confidence in supply management procedures	3.241	1.4522
Confidence in fixed asset management procedures	2.736	1.3172
Confidence in health and safety	2.975	1.2032
Confidence in risk management procedures	2.835	1.2085
Confidence in loss prevention procedure	2.645	1.2077
Confidence in organisation and management models	3.601	1.3155
Confidence in evaluation procedures for business services	2.951	1.2318
Confidence in communication procedures	3.940	1.1947

Table A6.1: Results of paired samples t-test comparing item means on the knowledge and confidence scales (all bursars)

Paired samples statistics		Mean	N	Std deviation	Std error mean	t	df	Sig (2-tailed)
Pair 1	KAPPSC_1	4.495	282	1.1964	.0712	2.999	281	.003
	CAPPSC_1	4.391	282	1.2977	.0773			
Pair 2	KPRINA_1	4.232	282	1.1450	.0682	3.706	281	.000
	CPRINA_1	4.102	282	1.3354	.0795			
Pair 3	KAUDFI_1	4.370	282	1.1866	.0707	4.523	281	.000
	CAUDFI_1	4.234	282	1.3219	.0787			
Pair 4	KCASHM_1	4.890	282	1.0946	.0652	2.279	281	.023
	CCASHM_1	4.825	282	1.1835	.0705			
Pair 5	KINVDB_1	3.137	282	1.3365	.0796	2.905	281	.004
	CINVDB_1	3.026	282	1.4352	.0855			
Pair 6	KPURPR_1	4.949	282	1.1526	.0686	1.179	281	.239
	CPURPR_1	4.923	282	1.1772	.0701			
Pair 7	KSTDEV_1	3.434	282	1.2475	.0743	5.486	281	.000
	CSTDEV_1	3.244	282	1.3095	.0780			
Pair 8	KLABRE_1	3.049	282	1.3210	.0787	3.910	281	.000
	CLABRE_1	2.921	282	1.3196	.0786			
Pair 9	KCOLLB_1	2.252	282	1.2275	.0731	3.247	281	.001
	CCOLLB_1	2.154	282	1.2310	.0733			
Pair 10	KPYRLP_1	3.563	282	1.4961	.0891	2.892	281	.004
	CPYRLP_1	3.460	282	1.5015	.0894			
Pair 11	KICTIL_1	3.224	282	1.1710	.0697	.935	281	.351
	CICTIL_1	3.195	282	1.2709	.0757			
Pair 12	KICTMT_1	2.993	282	1.1871	.0707	1.598	281	.111
	CISTMT_1	2.951	282	1.2114	.0721			
Pair 13	KUSEMI_1	4.205	282	1.2967	.0772	2.630	281	.009
	CUSEMI_1	4.132	282	1.3620	.0811			
Pair 14	KFACPL_1	2.815	282	1.2860	.0766	2.306	281	.022
	CFACPL_1	2.744	282	1.2803	.0762			
Pair 15	KMAINO_1	3.052	282	1.2039	.0717	3.188	281	.002
	CMAINO_1	2.970	282	1.2453	.0742			
Pair 16	KESTMG_1	2.735	282	1.3298	.0792	1.752	281	.081
	CESTMG_1	2.684	282	1.3421	.0799			
Pair 17	KVEHMG_1	2.317	282	1.3525	.0805	.713	281	.476
	CVEHMG_1	2.292	282	1.3131	.0782			

Table A6.1 continued

		Mean	N	Std deviation	Std error mean	t	df	Sig (2-tailed)
Pair 18	KCATSE_1	2.663	282	1.3263	.0790	.390	281	.697
	CCATSE_1	2.648	282	1.3641	.0812			
Pair 19	KSUPMG_1	3.296	282	1.4705	.0876	1.692	281	.092
	CSUPMG_1	3.241	282	1.4522	.0865			
Pair 20	KFXAST_1	2.749	282	1.3208	.0787	.403	281	.687
	CFXAST_1	2.736	282	1.3172	.0784			
Pair 21	KHANDS_1	3.100	282	1.1617	.0692	3.417	281	.001
	CHANDS_1	2.975	282	1.2032	.0717			
Pair 22	KRSKMG_1	2.936	282	1.1944	.0711	2.778	281	.006
	CRSKMG_1	2.835	282	1.2085	.0720			
Pair 23	KLOSSP_1	2.738	282	1.1900	.0709	2.840	281	.005
	CLOSSP_1	2.645	282	1.2077	.0719			
Pair 24	KORGMG_1	3.693	282	1.2449	.0741	2.952	281	.003
	CORGMG_1	3.601	282	1.3155	.0783			
Pair 25	KEVALB_1	3.045	282	1.1833	.0705	3.385	281	.001
	CEVALB_1	2.951	282	1.2318	.0734			
Pair 26	KCOMMS_1	4.063	282	1.1349	.0676	4.216	281	.000
	CCOMMS_1	3.940	282	1.1947	.0711			

Significance values should be divided by 2 as this was a one-tailed test ($p < 0.05$).

Table A6.2: Comparison between primary and secondary bursars of mean scores on the 26 items of the confidence scale (CH 3)

	Phase	N	Mean	Std deviation	Std error mean
CAPPSC_1	Primary	140	4.310	1.1866	.1003
	Secondary	103	4.475	1.3376	.1318
CPRINA_1	Primary	140	3.879	1.2835	.1085
	Secondary	103	4.403	1.2693	.1251
CAUDFI_1	Primary	140	4.045	1.2401	.1048
	Secondary	103	4.506	1.2558	.1237
CCASHM_1	Primary	140	4.913	1.0761	.0910
	Secondary	103	4.749	1.2234	.1205
CINVDB_1	Primary	140	2.779	1.4548	.1230
	Secondary	103	3.370	1.2830	.1264
CPURPR_1	Primary	140	4.920	1.1256	.0951
	Secondary	103	4.987	1.1246	.1108
CSTDEV_1	Primary	140	2.953	1.2198	.1031
	Secondary	103	3.704	1.3000	.1281
CLABRE_1	Primary	140	2.776	1.3518	.1143
	Secondary	103	3.110	1.2239	.1206
CCOLLB_1	Primary	140	1.987	1.1789	.0996
	Secondary	103	2.355	1.2535	.1235
CPYRLP_1	Primary	140	3.342	1.5006	.1268
	Secondary	103	3.687	1.4973	.1475
CICTIL_1	Primary	140	3.283	1.2171	.1029
	Secondary	103	3.095	1.2888	.1270
CICTMT_1	Primary	140	3.006	1.2495	.1056
	Secondary	103	2.899	1.1756	.1158
CUSEMI_1	Primary	140	4.187	1.3171	.1113
	Secondary	103	4.124	1.3303	.1311
CFACPL_1	Primary	140	2.457	1.1752	.0993
	Secondary	103	3.177	1.3256	.1306
CMAINO_1	Primary	140	2.713	1.1584	.0979
	Secondary	103	3.299	1.2978	.1279
CESTMG_1	Primary	140	2.412	1.2837	.1085
	Secondary	103	3.030	1.4055	.1385
CVEHMG_1	Primary	140	1.867	1.1480	.0970
	Secondary	103	2.758	1.2890	.1270
CCATSE_1	Primary	140	2.397	1.2598	.1065
	Secondary	103	2.995	1.4310	.1410

Table A6.2 continued

	Phase	N	Mean	Std deviation	Std error mean
CSUPMG_1	Primary	140	3.217	1.5095	.1276
	Secondary	103	3.269	1.3966	.1376
CFXAST_1	Primary	140	2.506	1.2098	.1022
	Secondary	103	3.137	1.3230	.1304
CHANDS_1	Primary	140	3.000	1.1875	.1004
	Secondary	103	2.932	1.2308	.1213
CRSKMG_1	Primary	140	2.807	1.1685	.0988
	Secondary	103	2.811	1.2343	.1216
CLOSSP_1	Primary	140	2.579	1.1879	.1004
	Secondary	103	2.679	1.2198	.1202
CORGMG_1	Primary	140	3.563	1.3242	.1119
	Secondary	103	3.647	1.3865	.1366
CEVALB_1	Primary	140	2.727	1.2337	.1043
	Secondary	103	3.211	1.2023	.1185
CCOMMS_1	Primary	140	3.942	1.2452	.1052
	Secondary	103	3.938	1.1866	.1169

Table A6.3: Independent samples test comparing primary and secondary bursars on the confidence scale

		Levene's test for equality of variances		T-test for equality of means		
		F	Sig	t	df	Sig (2-tailed)
CAPPSC_1	Equal variances assumed	1.711	.192	-1.017	241	.310
CPRINA_1	Equal variances assumed	.015	.903	-3.158	241	.002
CAUDFI_1	Equal variances assumed	.112	.738	-2.854	241	.005
CCASHM_1	Equal variances assumed	3.615	.058	1.109	241	.268
CINVDB_1	Equal variances assumed	3.264	.072	-3.288	241	.001
CPURPR_1	Equal variances assumed	.104	.747	-.453	241	.651
CSTDEV_1	Equal variances assumed	.703	.403	-4.606	241	.000
CLABRE_1	Equal variances assumed	4.517	.035	-1.981	241	.049
	Equal variances not assumed			-2.011	230.820	.045
CCOLLB_1	Equal variances assumed	1.030	.311	-2.337	241	.020
CPYRLP_1	Equal variances assumed	.001	.972	-1.771	241	.078
CICTIL_1	Equal variances assumed	.103	.748	1.161	241	.247
CISTMT_1	Equal variances assumed	.043	.835	.674	241	.501
CUSEMI_1	Equal variances assumed	.173	.678	.364	241	.716
CFACPL_1	Equal variances assumed	1.102	.295	-4.468	241	.000
CMAINO_1	Equal variances assumed	2.089	.150	-3.699	241	.000
CESTMG_1	Equal variances assumed	.662	.417	-3.560	241	.000
CVEHMG_1	Equal variances assumed	2.135	.145	-5.674	241	.000
CCATSE_1	Equal variances assumed	.303	.582	-3.453	241	.001
CSUPMG_1	Equal variances assumed	1.438	.232	-.270	241	.787
CFXAST_1	Equal variances assumed	.279	.598	-3.861	241	.000
CHANDS_1	Equal variances assumed	.283	.595	.437	241	.662
CRSKMG_1	Equal variances assumed	.016	.900	-.023	241	.982
CLOSSP_1	Equal variances assumed	.266	.607	-.644	241	.520
CORGMG_1	Equal variances assumed	.071	.790	-.478	241	.633
CEVALB_1	Equal variances assumed	.326	.568	-3.054	241	.003
CCOMMS_1	Equal variances assumed	.908	.342	.025	241	.980

Where Levene's $p > 0.05$, there is equality of variance. In this table there is only one case where this is not so, and for the item 'CLABRE' the lower row of values should be read.

Table A6.4: Primary and secondary bursars' mean scores on the 26 items of the knowledge scale

Item	Phase	N	Mean
KAPPSC_1	Primary	140	4.404
	Secondary	103	4.597
KPRINA_1	Primary	140	4.003
	Secondary	103	4.536
KAUDFI_1	Primary	140	4.160
	Secondary	103	4.639
KCASHM_1	Primary	140	4.892
	Secondary	103	4.927
KINVDB_1	Primary	140	2.866
	Secondary	103	3.541
KPURPR_1	Primary	140	4.914
	Secondary	103	5.036
KSTDEV_1	Primary	140	3.132
	Secondary	103	3.875
KLABRE_1	Primary	140	2.859
	Secondary	103	3.275
KCOLLB_1	Primary	140	2.043
	Secondary	103	2.495
KPYRLP_1	Primary	140	3.415
	Secondary	103	3.823
KICTIL_1	Primary	140	3.291
	Secondary	103	3.157
KICTMT_1	Primary	140	3.028
	Secondary	103	2.980
KUSEMI_1	Primary	140	4.251
	Secondary	103	4.214
KFACPL_1	Primary	140	2.480
	Secondary	103	3.290
KMAINO_1	Primary	140	2.759
	Secondary	103	3.440
KESTMG_1	Primary	140	2.444
	Secondary	103	3.104
KVEHMG_1	Primary	140	1.785
	Secondary	103	2.883
KCATSE_1	Primary	140	2.338
	Secondary	103	3.094

Table A6.4 continued

Item	Phase	N	Mean
KSUPMG_1	Primary	140	3.268
	Secondary	103	3.386
KFXAST_1	Primary	140	2.461
	Secondary	103	3.228
KHANDS_1	Primary	140	3.064
	Secondary	103	3.147
KRSKMG_1	Primary	140	2.793
	Secondary	103	3.067
KLOSSP_1	Primary	140	2.629
	Secondary	103	2.830
KORGMG_1	Primary	140	3.660
	Secondary	103	3.762
KEVALB_1	Primary	140	2.837
	Secondary	103	3.284
KCOMMS_1	Primary	140	4.058
	Secondary	103	4.072

Table A6.5: Independent samples test comparing primary and secondary bursars on the knowledge scale

		Levene's test for equality of variances		T-test for equality of means		
		F	Sig	t	df	Sig (2-tailed)
KAPPSC_1	Equal variances assumed	.491	.484	-1.252	241	.212
KPRINA_1	Equal variances assumed	.609	.436	-3.657	241	.000
KAUDFI_1	Equal variances assumed	.069	.794	-3.220	241	.001
KCASHM_1	Equal variances assumed	.181	.671	-.239	241	.811
KINVDB_1	Equal variances assumed	3.494	.063	-3.985	241	.000
KPURPR_1	Equal variances assumed	.774	.380	-.838	241	.403
KSTDEV_1	Equal variances assumed	.134	.714	-4.840	241	.000
KLABRE_1	Equal variances assumed	1.225	.269	-2.491	241	.013
KCOLLB_1	Equal variances assumed	2.593	.109	-2.931	241	.004
KPYRLP_1	Equal variances assumed	.507	.477	-2.114	241	.036
KICTIL_1	Equal variances assumed	.022	.883	.903	241	.368
KICTMT_1	Equal variances assumed	.007	.933	.312	241	.755
KUSEMI_1	Equal variances assumed	.057	.811	.230	241	.818
KFACPL_1	Equal variances assumed	1.248	.265	-5.015	241	.000
KMAINO_1	Equal variances assumed	1.335	.249	-4.426	241	.000
KESTMG_1	Equal variances assumed	.799	.372	-3.898	241	.000
KVEHMG_1	Equal variances assumed	3.726	.055	-7.082	241	.000
KCATSE_1	Equal variances assumed	.187	.666	-4.618	241	.000
KSUPMG_1	Equal variances assumed	1.559	.213	-.614	241	.540
KFXAST_1	Equal variances assumed	.399	.528	-4.661	241	.000
KHANDS_1	Equal variances assumed	.011	.918	-.538	241	.591
KRSKMG_1	Equal variances assumed	.105	.746	-1.771	241	.078
KLOSSP_1	Equal variances assumed	1.067	.303	-1.304	241	.194
KORGMG_1	Equal variances assumed	.006	.937	-.618	241	.537
KEVALB_1	Equal variances assumed	.079	.779	-2.911	241	.004
KCOMMS_1	Equal variances assumed	2.074	.151	-.092	241	.927

Where Levene's $p > 0.05$, there is equality of variance. In this table no item infringed this requirement. Significance values should be divided by 2 as this was a one-tailed test ($p < 0.05$).

We are asking you to complete this important survey which is designed to enable us to assess the impact which the DSBM course has had on school business managers and their schools. The questionnaire will take approximately 15 minutes to complete. Thank you for completing this questionnaire. Your views are important in shaping NCSL's policies for the BDP and the future role of school business managers.

A. Personal information

Candidate name:

Mr / Mrs / Ms / Dr / Prof (delete as appropriate)

What is the pupil roll of your school?

Does your school have specialist status? Y / N

If Yes give details.

School phase: (delete as appropriate) Primary / Middle / Secondary / Other (please specify):

Cohort enrolled on / completed (delete as appropriate)

Pilots ☐ Cohort 1 ☐ Cohort 2 ☐ Cohort 3 ☐ Cohort 4 ☐ Cohort 5 ☐ (tick as appropriate)

B. Your role as a school business manager (SBM) or bursar

1. What is your current job title?

2. Has this changed as a result of your attendance on the CSBM course? Y / N

2a. If yes, what was it before?

3. How long have you been in post at your present school?

4a. Are you a member of the senior management team in school? Y / N

4b. If yes, for how long have you been a member?

5. How many other staff are members of the senior management team?

6. How many support staff do you manage?

7. What percentage of your time is spent on each of the following:

Category	Currently (%)	Before doing CSBM (%)
Leadership		
Management		
Administration		

8. In what ways has your role changed after completing the CSBM?

If your role has changed in relation to question 8 why do you think this change has occurred? The aim of this question is to add a bit of qualitative feedback to question 8.

C. Please tell us whether your understanding of the following has changed as a result of completing the CSBM course:

	Very much	Better	About the same
Health and safety	1	2	3
Facilities management	1	2	3
ICT	1	2	3
Management	1	2	3
Financial management	1	2	3
Human resources management	1	2	3
Administration	1	2	3
Risk management	1	2	3
Strategic development of the school	1	2	3

D. As school business manager what impact do you feel you now have on the following in your school?

	Big impact			Little impact	
Health and safety	1	2	3	4	5
Facilities management	1	2	3	4	5
ICT	1	2	3	4	5
Management	1	2	3	4	5
Financial management	1	2	3	4	5
Human resources management	1	2	3	4	5
Administration	1	2	3	4	5
Risk management	1	2	3	4	5
Strategic development of the school	1	2	3	4	5

- 2.** What has been your most significant achievement at school in the last 12 months as a result of the CSBM course?

- 3.** Are you able to give specific examples of cost savings or other impacts which you have had as a result of the CSBM course? Y / N

- 3a.** If yes, please give brief details of project and amount.

- 4a.** As a result of the knowledge you have gained from the CSBM course are you able to give specific examples of new money which you have attracted? Y / N

- 4b.** If yes, please give brief details of the amount and its purpose.

What was your school's overall budget for the last financial year (2004–05)?

- E. Please tell us how you rate the impact of the CSBM course on yourself as an individual professional by circling the appropriate level:**

Category	Big impact			Little Impact	
Confidence in doing your job	1	2	3	4	5
Technical knowledge	1	2	3	4	5
Understanding schools	1	2	3	4	5
Personal satisfaction	1	2	3	4	5
Ability to operate as a leader	1	2	3	4	5

F. Please tell us how you rate the following aspects of the CSBM course delivery by circling the appropriate level:

	High				Low
1. Achievement of the learning objectives	1	2	3	4	5
2a. Quality of any training materials used (online)	1	2	3	4	5
2b. Quality of any training materials used (printed)	1	2	3	4	5
3. Tutor effectiveness in delivering the sessions	1	2	3	4	5
4. Organisation of the residential sessions	1	2	3	4	5
5. Quality and effectiveness of tutor support in residential sessions	1	2	3	4	5
6. Quality and effectiveness of tutor support online	1	2	3	4	5
7. The venue's fitness for purpose	1	2	3	4	5
8. Pre-course and overall support from the administrative team	1	2	3	4	5

G. CSBM Graduate background and school information

1. What is your highest level of educational qualification before completing the CSBM course? (tick as appropriate)

GCSE or O-level ☐ A level ☐ NVQ ☐ Accounting technician ☐ First degree ☐
Masters degree ☐ Other (please specify)

2. Within which bracket does your annual salary fall (tick as appropriate)? If you are part-time, please give a full-time equivalent (FTE).

Under £20,000 ☐ £21,000–£25,000 ☐ £26,000–£30,000 ☐ £31k - £35k ☐ above £36,000 ☐

3. Would you recommend the CSBM course to a colleague? Y / N (Please give reasons for your response.)

4. Please add any comments below which you feel would help to improve the course for the future.

H. Future plans

1. Are you doing the DSBM course? Y / N 2. Would you consider doing the DSBM course? Y / N

Thank you for completing this questionnaire.

Diploma of School Business Management (DSBM)**Evaluation questionnaire: session 1**

It is vital that you complete this evaluation form before leaving the session. The form examines your experience of the various workshops and your learning over the last two days. Please circle the appropriate responses.

Candidate name:

Candidate ID number:

Gender (delete as appropriate): Male / Female

Training provider name (delete as appropriate): MMU / SERCO / University of Lincoln

Cohort number:

Primary ☐ Secondary ☐ Special ☐ Other (please specify):

Name of venue:

Government region (circle as appropriate): North East, North West, South West, South East, West Midlands, Eastern, London, Yorkshire and the Humber, East Midlands

Questions (circle as appropriate)

1. How helpful were the introductory activities in workshop 1?	Very helpful 1 2 3 4 5
2. How well did the activities in workshop 2 enable you to visualise the school business manager in the 21st century?	Very clearly 1 2 3 4 5
3. How would you rate your understanding of strategic management before the course?	High 1 2 3 4 5
4. How much has your understanding of strategic management been changed by workshop 3?	Greatly 1 2 3 4 5
5. To what extent did workshop 4 on futuring develop your strategic thinking?	Greatly 1 2 3 4 5
6. How helpful was workshop 5 in developing your personal management?	Very helpful 1 2 3 4 5
7. As a result of workshop 6 how confident are you now with the online learning environment?	Very confident 1 2 3 4 5

8. As a result of workshop 7 how much better do you feel about project planning?	Much better 1 2 3 4 5 Not much changed
9. How helpful were the activities of workshop 8 online strategic management?	Very helpful 1 2 3 4 5 Not helpful
10. To what extent has your perception of leadership, management and administration been developed by workshop 9?	A lot 1 2 3 4 5 Not much
11. How clear did you find the assessment requirements (workshop 10)?	Very clear 1 2 3 4 5 Not clear
12. To what extent did the action planning (workshop 11) enable you to see your way ahead?	A lot 1 2 3 4 5 Not much
13. The quality of the training materials used was:	High 1 2 3 4 5 Poor
14. Tutor effectiveness in delivering the session was:	Effective 1 2 3 4 5 Not effective
15. Was the venue fit for purpose?	Very suitable 1 2 3 4 5 Not fit
16. Pre-course and overall support from the administrative team was:	High level of support 1 2 3 4 5 Poor level of support

17. Please add any comments below which you think would help to improve the course for the future.

Follow-up visits: We may be conducting follow-up with DSBM participants in their schools or through telephone interviews. If you would be willing to participate, please complete your details below.

Preferred contact number:

Best times to contact you:

Email address:

Thank you for completing this evaluation form. Your views are important to the programme team and this evaluation is used to develop the course for future DSBM candidates.

Diploma of School Business Management (DSBM)

Evaluation questionnaire: session 2

It is vital that you complete this evaluation form before leaving the session. The form examines your experience of the various workshops and your learning over the last two days. Please circle the appropriate responses.

Candidate name:

Candidate ID number:

Gender (delete as appropriate): Male / Female

Training provider name (delete as appropriate): MMU / SERCO / University of Lincoln

Primary ☐ Secondary ☐ Special ☐ Other (please specify):

Name of venue:

Government region (circle as appropriate): North East, North West, South West, South East, West Midlands, Eastern, London, Yorkshire and the Humber, East Midlands

Questions (circle as appropriate)

1. How helpful were the introductory activities in workshop 1?	Very helpful 1 2 3 4 5 Not helpful
2. How well did the activities in workshop 2 enable you to identify the key issues affecting school business managers with respect to school improvement?	Very well 1 2 3 4 5 Not well
3. How would you rate your understanding of school Improvement before this residential session?	High 1 2 3 4 5 Low
4. How much has your understanding of school Improvement been changed by workshop 2?	Greatly 1 2 3 4 5 Not much
5. To what extent did workshop 3 on quality develop your thinking about contextual variables?	Greatly 1 2 3 4 5 Not much
6. How helpful was workshop 4 in developing your formal communication skills?	Very helpful 1 2 3 4 5 Not helpful
7. As a result of workshop 5 how helpful has the tutor support time been to date?	Very helpful 1 2 3 4 5 Not helpful
8. As a result of workshop 6 how do you feel about developing critical skills in dealing with research-based or policy materials?	Much better 1 2 3 4 5 Not much changed

9. How helpful were the activities of workshop 7 in helping you understand how schools can approach tasks of improvement and change?	Very helpful 1 2 3 4 5 Not helpful
10. To what extent has your understanding of performance management been developed by workshop 8?	Greatly 1 2 3 4 5 Not much
11. To what extent has your learning moved on in the area of school improvement?	Greatly 1 2 3 4 5 Not much
12. How much clearer now are the implications of school improvement for your role in school?	Greatly 1 2 3 4 5 Not much
13. To what extent has your understanding of issues in marketing (customers, clients etc) been developed during workshop 10?	Greatly 1 2 3 4 5 Not much
14. How clear are you about the assessment requirements for this module (MSI) after this residential session and workshop 11?	Much clearer 1 2 3 4 5 Still unclear
15. Have your expectations for the DSBM course changed since the first residential session?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, how?	
16. How do you rate the pre-course administration and overall support?	Very helpful 1 2 3 4 5 Not helpful
17. The venue used for the residential session was fit for purpose.	Agree 1 2 3 4 5 Disagree
18. How useful were the materials provided, eg pre-residential course reading, handouts, course materials?	Very useful 1 2 3 4 5 Not useful
19. Please add any comments below which you think would help to improve the course for the future.	

Follow-up visits: We may be conducting follow-up with DSBM participants in their schools or through telephone interviews. If you would be willing to participate, please complete your details below.

Preferred contact number:

Best times to contact you:

Email address:

Thank you for completing this evaluation form. Your views are important to the programme team and this evaluation is used to develop the course for future DSBM candidates.

Diploma of School Business Management (DSBM)

Evaluation questionnaire: session 3

It is vital that you complete this evaluation form before leaving the session. The form examines your experience of the different workshops and your learning over the last two days. Please circle the appropriate responses.

Candidate name:

Candidate ID number:

Gender (delete as appropriate): Male / Female

Training provider name (delete as appropriate): MMU / SERCO / University of Lincoln

Primary ☐ Secondary ☐ Special ☐ Other (please specify):

Name of venue:

Government region (circle as appropriate): North East, North West, South West, South East, West Midlands, Eastern, London, Yorkshire and the Humber, East Midlands

Questions (circle as appropriate)

1. How helpful were the introductory activities in workshop 1?	Very helpful 1 2 3 4 5
2. How well did the activities in workshop 2 enable you to identify the key influences with respect to managing change?	Very well 1 2 3 4 5 Not well
3. How would you rate your understanding of change management before this residential session?	High 1 2 3 4 5 Low
4. How much has your understanding of change management been enhanced by this residential session?	Greatly 1 2 3 4 5 Not much
5. To what extent did workshop 3 help you to grasp the importance of extending opportunities and ensuring accountability?	Greatly 1 2 3 4 5 Not much
6. How helpful was workshop 4 in helping you gain the most from your tutor?	Very helpful 1 2 3 4 5 Not helpful
7. How helpful were the ideas of Bush, as presented in workshop 5, in focusing your thoughts on the cultural values of the school?	Very helpful 1 2 3 4 5 Not helpful
8. As a result of workshop 6, to what extent has your understanding of change, resistance and complexity been enhanced?	Greatly 1 2 3 4 5 Not much

9. How accessible were the pre-reading references given for this section?	Accessible				Not accessible
a. De Jager	1	2	3	4	5
b. Druskat	1	2	3	4	5
c. Wallace	1	2	3	4	5
10. How helpful were the activities of workshop 7 in helping you understand issues surrounding teams?	Very helpful				Not helpful
	1	2	3	4	5
11. To what extent has your understanding of resistance been developed by workshop 8?	A lot				Not much
	1	2	3	4	5
12. To what extent has your learning moved on in the area of change management?	A good deal				Not much
	1	2	3	4	5
13. How much clearer now are the implications of change management for your role in school?	Much clearer				Not much
	1	2	3	4	5
14. To what extent has your understanding of the analysis of change been developed during workshops 9A and 9B?	A good deal				Not much
	1	2	3	4	5
15. How clear are you about the assessment requirements for this module (CM) after this residential session and workshop 10?	A lot clearer				Still unclear
	1	2	3	4	5
16. Have your expectations for the DSBM course changed since the first residential session?	Yes <input type="checkbox"/>		No <input type="checkbox"/>		
If yes, how?					
17. How do you rate the pre-course administration and overall support?	Very helpful				Not helpful
	1	2	3	4	5
18. The venue used for the residential session was fit for purpose.	Agree				Disagree
	1	2	3	4	5
19. How useful were the materials provided, eg pre-residential course reading, handouts, course materials?	Very useful				Not helpful
	1	2	3	4	5
20. In what terms would you recommend the DSBM to a colleague?	Strongly				Warn them off
	1	2	3	4	5

19. Please add any comments below which you think would help to improve the course for the future.

Follow-up visits: We may be conducting follow-up with DSBM participants in their schools or through telephone interviews. If you would be willing to participate, please complete your details below.

Preferred contact number: _____

Best times to contact you: _____	Email address: _____
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Thank you for completing this evaluation form. Your views are important to the programme team and this evaluation is used to develop the course for future DSBM candidates.

We are asking you to complete this important survey which will enable us to assess the impact of the DSBM course on school business managers and their schools. The questionnaire will take approximately 15 minutes to complete. Thank you for completing this questionnaire. Your views are important in shaping NCSL's policies for the BDP and the future role of school business managers.

A. Personal information

Candidate name:

Mr / Mrs / Ms / Dr / Prof (delete as appropriate)

What is the pupil roll of your school?

Does your school have specialist status? Y / N

If Yes give details.

School phase: (delete as appropriate) Primary / Middle / Secondary / Other (please specify):

Cohort enrolled on / completed (delete as appropriate)

Pilots ☐ Cohort 1 ☐ Cohort 2 ☐ Cohort 3 ☐ Cohort 4 ☐ Cohort 5 ☐ (tick as appropriate)

B. Your role as a school business manager (SBM) or bursar

1. What is your current job title?

2. Has this changed as a result of your attendance on the DSBM course? Y / N

2a. If yes, what was it before?

3. How long have you been in post at your present school?

4a. Are you a member of the senior management team in school? Y / N

4b. If yes, for how long have you been a member?

5. How many other staff are members of the senior management team?

6. How many support staff do you manage?

7. What percentage of your time is spent on each of the following:

Category	Currently (%)	Before doing DSBM (%)
Leadership		
Management		
Administration		

7b. Where your role has changed in relation to the three areas since completion of the DSBM course, please give further details:

Leadership

Management

Administration

8. In what other ways has your role changed following completion of the DSBM course?

C. Please tell us whether your understanding of the following has changed as a result of completing the DSBM:

	Very much	Better	About the same
Strategic management	1	2	3
School improvement	1	2	3
Change management	1	2	3

D. As school business manager what impact do you feel you now have on the following in your school?

	Big impact			Little impact	
Strategic management	1	2	3	4	5
School improvement	1	2	3	4	5
Change management	1	2	3	4	5

- 2.** What has been your most significant achievement at school in the last 12 months as a result of the DSBM course?

- 3.** Are you able to give specific examples of cost savings or other impacts which you have had as a result of the DSBM course? Y / N

- 3a.** If yes, please give brief details of project and amount.

- 4a.** As a result of the knowledge you have gained from the DSBM course are you able to give specific examples of new money which you have attracted? Y / N

- 4b.** If yes, please give brief details of the amount and its purpose.

What was your school's overall budget for the last financial year (2004–05)?

- E. Please tell us how you rate the impact of the CSBM course on yourself as an individual professional by circling the appropriate level:**

Category	Big impact			Little Impact	
Confidence in doing your job	1	2	3	4	5
Technical knowledge	1	2	3	4	5
Understanding schools	1	2	3	4	5
Personal satisfaction	1	2	3	4	5
Ability to operate as a leader	1	2	3	4	5

F. Please tell us how you rate the following aspects of DSBM course delivery by circling the appropriate level:

	High				Low
1. Achievement of the learning objectives	1	2	3	4	5
2a. Quality of any training materials used (online)	1	2	3	4	5
2b. Quality of any training materials used (printed)	1	2	3	4	5
3. Tutor effectiveness in delivering the sessions	1	2	3	4	5
4. Organisation of the residential sessions	1	2	3	4	5
5. Quality and effectiveness of tutor support in residential sessions	1	2	3	4	5
6. Quality and effectiveness of tutor support online	1	2	3	4	5
7. The venue's fitness for purpose	1	2	3	4	5
8. Pre-course and overall support from the administrative team	1	2	3	4	5

G. Graduate background and school information

1. What is your highest level of educational qualification before completing the DSBM course? (tick as appropriate)

GCSE or O-level ☐ A level ☐ NVQ ☐ Accounting technician ☐ First degree ☐
Masters degree ☐ Other (please specify)

2. Within which bracket does your annual salary fall (tick as appropriate)? If you are part-time, please give a full-time equivalent (FTE).

Under £20,000 ☐ £21,000–£25,000 ☐ £26,000–£30,000 ☐ £31k - £35k ☐ above £36,000 ☐

H. Future plans

1. What was your motivation to complete this programme? (eg completion of the CSBM course)

2. Would you recommend DSBM to a colleague? (Please give reasons for your response.) Y / N

3. Do you think there is any need for further activities or provision beyond the DSBM course? Y / N

If yes, please give details.

4. Do you intend to undertake any further study (eg degree, Masters, professional qualifications etc)? Y / N

5. Please add any comments below which you feel would help to improve the course for the future.

Thank you for completing this questionnaire.

BDP case study 1 (DSBM)

I came into education in 1999 after working in the police force, where I was a neighbourhood watch officer. Previously I'd worked for CEGB, Nuclear Electric, then as a clerical apprentice, moving on up to running the finance and purchasing departments at Bartley Power Station. So I came in totally off the wall from a different direction when I started at the county's smallest secondary, with only 250 pupils. I came to this school in June 2001.

I came into schools for the usual reason – working mum, wanted school holidays – but for me I also wanted to get back into my first career, which was finance, and I liked the sound and the variety of the tasks that were part of the bursar's job. I came here as the bursar, and I've sort of progressed here, and in September last year I became the business manager.

The headteacher felt the role that I started in, in June 2001, was very much a bursar. I looked after the premises, I looked after the budgets, but that was it. I developed the role, or the role developed around me, I'm not sure which, but by September 2004 it was very apparent that that wasn't the role that I was doing any more. I was involved in new buildings; I was involved in fairly heavy tenders, lots of meetings. The headteacher decided, along with the governors, that really my role had outgrown the bursar's role; it was the business manager's, because it covered a much wider area. She felt that I was being supported in terms of academic progression and training through the coursework of DSBM to take on the role. From September they wanted me to be a full partner in the SMT, but the head was concerned that that would be a huge jump for me. The course, which was something she wanted me to do, for myself and for the school, gave me a good grounding and helped me when I joined the SMT. The confidence that I've got from the course means I understand far better the workings, where it relates to, and I feel a full member in my own right.

I'm not afraid to come up with ideas, and I know the head values that, because I come at things with a totally different perspective. She's much more confident to leave things to me now. She certainly values what's come out of the DSBM in terms of my support to her.

When I first came here she did the budget, she did all the salaries, and she would sit on every meeting to do with buildings, she would sit on everything. The only thing that she does in terms of the salaries is look at them when I've done them. If we've got building projects, she just leaves me to deal with it now, and I just report back to her.

The first thing I did when I changed to business manager is our signing-in book. It used to be 'teaching and non-teaching staff', we'll get rid of that, so we now have 'teaching and support staff'. I cover site staff, admin staff, finance staff, midday supervisors and librarians. I've got quite a range.

I can't imagine doing this job now without having done the course. It's had such an impact in so many different ways. The change module and emotional intelligence and stuff like that: I have to use that so much at the moment in terms of retaining staff and guiding them through the change process. Then there's the strategic side: we're trying to push forward and bring in the recognition for the support staff that they deserve to bring their status up. Just those two modules alone, absolutely amazing.

Since I've been here I've always been trying to identify funding. I actually found a loophole that said if it's workforce reform you can use revenue as your capital contribution, and so we qualified, we actually got £25,000 worth of funding. School travel plans funding: I've brought in another £20,000 this year for school travel plans, and so I've always done that sort of thing. I've honed my IT purchasing skills, and I was talking to the local authority's hardware guys and we talk about how much they pay for their PCs, and I can buy them cheaper than the local authority now.

I've got to say the best thing that's happened for the school business manager profession has been the [BDP]. The most useful part was actually doing the modules. The three modules were very, very good. I liked the blended learning, and I thought that way of learning was absolutely cracking. The way that the learning programme was put together, you were encouraged to use lots of the websites. The talk2learn site is ... so addictive. I go on daily now, it's a ritual, and you come in, in the morning and put your PC on, and the first thing you do is to log onto NCSL and see what's going on.

Leadership is where I like to be. As a business manager you are a leader, and though I never thought I could be a leader, now I'm back in the department I'm actually enjoying it and, well, I personally think I've just got a lot to give to the department, and I'd like to spend more time pushing the boundaries and driving them forward.

BDP case study 2 (DSBM)

I actually started off in a totally different way at a catering college, and from there ... because I enjoyed the financial side I went to work for a firm of accountants for six years. Then I decided that actually pure accountancy was not what I wanted to do. I transferred to an FE sixth-form college, and worked my way up to being the management accountant.

I'd always thought a school bursar was where I'd like to be, and during my time in the sixth-form college I'd studied to do my Further Adult Education Teaching Certificate (FAETC), to allow me to teach post-16s. So I'm a qualified management accountant, plus I've got my FAETC, so that's my prior qualifications.

When people ask, "what do you do as bursar?" I say, "I'm responsible for everything non-teaching" ... I'm responsible for the premises, the finance and the personnel of the support staff, and when I say support staff, the only area I'm not totally responsible for [is] the teaching assistants, although when it comes to the recruitment of them I am involved in that. Training: I'm obviously involved in that side of things. I'm clerk to the governing body. I'm exams officer. What else do I look after? All the science technicians, BT technicians. I directly line-manage eight team leaders, and obviously within them there's large teams, because in the premises, for example, we do all our own cleaning. So I have about 50 support staff that I'm responsible for. I'm responsible for getting the IT into the classrooms, for the buildings they're sitting in, the chairs they're sitting on, the paint on the walls, everything, and the staff that are supporting them. I think unless you actually shadowed a bursar in a big school for a week, you would actually be quite surprised at what we have to do.

As part of the senior management team, I feel comfortable, and though initially I sat back more and felt [like] the new girl, the head was very good at saying, “What do you think, Tina?” and so he did get me involved, but now I have no problem at all. In terms of areas where I free up time for the head, the budget is an obvious one. He very much leaves that to me.

Mind you, on funding saved, the biggest thing was ... me taking on exams officer and one of my staff got a few extra hours to do it.

A simple example of procurement savings ... last year we went to a whole-school network ... we had a curriculum network and an admin network, so we brought the two together. We did all of that, and we sourced 150 computers, did all the negotiation with the three providers, the best quotes etc, and took that to the governing body. All of that was done by myself and the IT guys and it got through.

There are other things we’ve done. We’ve brought grounds in-house, and that’s saved us probably £10,000 a year, because we have a fantastic grounds man now, that we can employ all year round, so he can cut the grass when he wants etc. We’ve done things as we’ve gone along, but ... we don’t use [the] county [council services] that much.

The [BDP] actually helped me with my case study ... we currently had two old libraries, one on the lower site that was used a little bit, and one on the upper site that wasn’t really used that much. I said to the head, “It’s like walking back in here when I was a student.” There had been no moving on, and it was very full of books, which, okay, is fine for a library, but we’re in an IT era. We’ve totally revamped it. We closed the one on the lower site and we ... went in for an IT room, and we’ve just doubled the size of it up here, put in computers, left the books as well, so we’ve got a lovely resource centre. The course helped me think about things, because we changed the staffing structure. The resource centre has had a huge impact on the school ... a huge, huge strategic impact on the school, with the way it’s being used. I mean it’s always full now and we could do with about three of them, because it’s just always booked.

The DSBM was really good ... the networking I particularly found very useful. Attending the residential sessions and seeing the faces was lovely, which did help, and I would recommend that, because of the informal information you get out of people.

BDP case study 3 (DSBM)

My career history: I started out doing an HND in hotel management and later I enrolled and did the AAT.

This school is a technology college. We've got the specialisms we're also a training school for new teachers.

I'm the school manager and the budget is just over £6 million. My responsibilities are health and safety officer, personnel, data protection, freedom of information; I oversee the [private finance initiative] contract, I deal with the catering, the cleaning contract and anything to do with premises. I am also involved with procurement. We buy in payroll, so I'm responsible for all of the paperwork related to that. As of April schools have their entire budget and they get billed monthly for the payroll. Because we've had more money we've put money on the treasury so we've managed to get more interest.

We bank with XXX bank and they would charge us tax on our bank interest which obviously in previous years hadn't been that much anyway. But suddenly we think, "We're in all this money, why are they taxing us so much on it?" So we had that interest paid to us. I think we've got about £5,000 back.

For all other trips staff are recruiting for, we don't ask them for a set price because we can't. We have to ask them for a donation so if, with our letters asking for the donation, we give in the gift aid form hopefully we'll get some money back that way. We are a big school: we take a lot of money on trips. I've got all the paperwork printed off, so we'll see.

On our massive support staff (which in this school is virtually 110), on the one hand we've got lots of graduates ... no one would even think that they were because they're support staff. On personnel issues ... very often [the SMT] will say "Oh, we need to get so and so," and I've suggested, "Let's look in internally, let's raise the profile of somebody who has been something with very low status." So, for example, one of our support staff came in as an NTA, then transferred across to learning support assistant and now she's a cover supervisor, and her only problem is that she hasn't got the degree or the base knowledge in any given subject, but her pupil management is excellent. There is scope for her to go on but she hasn't got her maths GCSE, so she's doing that in school.

I've gained a number of benefits from the course: first it's given me a huge insight into what the school is as a whole estate. Second, the change management stuff helped me because I'm on the change-of-management team. From that point of view ... that was very useful, particularly with me being new: going on with the new management team because I could work out the dynamics and how it changes with different groups of people, so I used it here.

BDP case study 4 (CSBM)

I started off as a senior clerk here five years ago. Before the CSBM, I was administrator and now I am school manager and the salary is being reviewed. So there you go, it is working. It has helped that I have been able to provide, from the website, details of the salary levels that bursars are on, along with job descriptions and salaries, and go to the headteacher and say, “Look, that is what we are getting and what other people are getting.”

My responsibilities include office manager, finance bursar, premises, link to the non-support staff, looking at their training and any other issues. The premises staff, we have got 2 site managers, 18 cleaners, basically all the supervision; not the dinner ladies as they are separate. They are external, the ones who cook the meals.

Before the CSBM course, I probably used to keep myself to myself. All the work that I used to do I never let anybody know about it. Now I actually minute things and give a copy to the headteacher so he is getting more information, he is actually seeing what I am doing. I think that is a plus, I never did that before. You look more at how you are managing people through minutes and meetings, so that is certainly a plus.

We now have won a bid to develop a specialised PE block. We have also got a technology [area], a £1.5 million technology bid to refurbish it and add an additional dance studio. It is going to be open to the community so we are going to have a reception area. The school will manage that through extended schools because we are a full-service extended school. You can see why I have been so busy recently? That will open in January and I did the project for the refurbishment of the area. We have had a reception area built on, I added all that. That was completed in April this year. That was difficult, we had three new staff and at one point we had to move out of the reception area for a couple of days. It has been a nightmare trying to get all the cabling and the computers and the network.

The course materials were great, they really were. The interaction with the group was really useful, and talk2learn is great. ... I found all the workshops enjoyable, I learnt quite a lot; you learn about yourself as well, how you operate and ... how others operate and respect others. Don't always go on face value ... I used to do it, use my intuition, if I saw someone and I didn't like them that would be it. Now I wait till later. I thought all my tutors have been great.

The course has brought up so many issues which I am dealing with here at school: ... we have got most of the premises register but it is here, there and everywhere, it is not in one place. All that needs updating, it needs coordinating: where it is, how often it needs to be checked, its security. The inventory, it is all the things that were highlighted from ... the course, and I have just become responsible for premises. I have an idea of what we need but the CSBM has highlighted it all. It also puts it all into some structure, which we have never had before. The previous premises manager knew exactly what was going on but he had it all in his head, which is no good to anybody else. I put the first-aid policy together.

We had a problem with the catering. They didn't put any machines in and they didn't ask us if they could put them in ... I would never have thought of doing it before the CSBM, but I did a [strengths, weaknesses, opportunities, threats] (SWOT) analysis, and I held a meeting with the catering division manager and the agreement administrator, and we are trying to get that sorted out. Because I did the SWOT analysis I actually got them in. The head now is giving me more and more of that to do. He is happy to leave meetings to me and for me to chair them.

I think what this course has taught me is that I cannot do everything myself. As an office manager or administrator you do work by yourself and I am now getting some support from the SMT, but I think that is only because now I am working as a team player. The risk management section, I haven't completed that yet, but the new assistant headteacher who has just joined, he is the health and safety person. Even though I am premises, I have said to him I will work together on that. So I am also helping others.

BDP case study 5 (CSBM)

I have been here for 15 years. I started on 18.5 hours as a secretary and it has just increased and the scale has been increased by the various heads who have been in. After a few changes of head, each time they come in initially they don't realise how I can manage the budget, and perhaps therefore feel they need the involvement in it. But they just don't have the time. Other things crop up. They have looked at what I have done and I have just worked my way up. It was [an] S3 post and now it's 5 or 6.

I completed the [AAT] at college, which was fine. My headteacher saw this [CSBM] course advertised and said that it would be very useful for me to do ... It was really enjoyable. It was a good group, it just made you feel comfortable and the whole team made you believe in yourself. I really enjoyed it. In fact from the word go, I thought it was a bit scary, the education enterprise bit, but I was made to think. I really liked the opportunity to think about where I fitted in with things. I would write, "Well, I don't give enough support" and the head would come along and say, "I think you will find that the staff think that you give them a lot of support." And it sorted me into the key position that I have in school. I looked at ethics and whether you do sickness returns and how you deal with it, I like that bit. When I went on the first residential session I thought, "How am I going to do this?" I thought, "I am just going to have to," so I started writing, I finished my learning development portfolio, which went in at Easter. I didn't find too much difficulty with what I have written. I enjoyed it ... taking my time out and thinking about where I am and talking to my head about it. I thought the blended learning was really good. It linked in well together. I smiled to myself at the start of the course, "I am not from a computer age," but once into it I found it really good.

While doing the course, our school amalgamation has been approved. We are having a new school. We will be here for one year and then we are moving onto a field between the two schools ... So it is a complete new staffing structure. We have all been made redundant and had to reapply for our posts. It has been a tense time for everybody. After that it has been a perfect remodelling opportunity. I am pleased with the role I have but ... I [will still be] on the same grade that I am on now. I have taken on line management responsibilities on the same grade that I am on now but I will say that I am incredibly fortunate to have got onto that grade in a small school.

Even if the new bursar's job hadn't come out of it, it would have been so good just for me as a person, for my professional development. The course has brought in the [terminology] ... when you go into the interview having done your modules you think, "Oh, I can talk about this." That's where you can make the difference. I was really nervous about the interview, yet really wanted this job and thought, "Right, this is awful." But what made the difference, really, was the course. I could talk financial planning linked to the school development plan. I wouldn't have known the vocabulary unless I'd recently written out model answers. That makes a huge difference in [the] interview scenario.

My head has told me that trained bursars are thin on the ground. I have been very fortunate here. There are many primary schools in this authority where the finance officer comes from the authority to report to governors without that inside knowledge. My head tells me she too feels very fortunate in having me here.

BDP case study 6 (CSBM)

I am the bursar at this school, which is a residential specialist school for children with moderate learning difficulties. We have 92 children on the roll, and we cater for the 2–16 age range. We are also a residential school, and we have 54 staff.

The structure of the school is the headteacher, deputy headteacher, one assistant headteacher, one head of primary, head of secondary and head of care. But I am not a member of the SMT. Basically the SMT consists of the head of care, the head, deputy and the [primary and secondary heads]. I think that they are ... looking to increase the membership of the management team. I hope that will include me as I feel that I need to be there with the role and responsibilities that I have within the school.

My main responsibilities are financial management ... and personnel. But I have a finger in all sorts of pies, ... particularly in regard to building, the facilities management, although it is not on my job description. I do tend to pick up lots of things. And I think it is a role that ... the head would like me to have, the facilities, and maybe management of the caretaker and the cleaning staff, but it is very much restrictive of time really.

I do have a lot of admin responsibility and I think that the school has recognised that recently. We appointed a member of staff, last September, for 6 hours a week and since May they have increased those hours to 15. We have got a secretary who works for seven hours a week and the other lady who started on six hours last September and she has been kept busy on six hours for purchase orders and invoices. Now I am hoping she'll take some of the other things. I do all sorts of things, sickness, school funds, everything really that's secretarial. I sort of think ... she is working 15 hours, how did I do that before? I think it is moving away from that more admin role to a more managerial role and looking at the key things that affect the school, like financial management and looking after the systems, making sure that we are doing what we need to be doing. So we do need to develop my role to become more managerial.

The course has helped but it has also increased the pressures on me and my time. A positive is, I suppose, my case study. This follows the fact that we had a very poor cleaning inspection, basically the team were failed in the inspection, and I am looking at reviewing the cleaning facilities of the school.

I don't know if I am going to make the assessment in October, which I am very concerned about, but obviously I am determined to get through it, but it is just the time thing. I put in lots of extra hours at work; I am working nearly 40 hours a week, when I am contracted for 33. I have got a young family and something has to give and it's the course. I am just finding now that I am just getting over things in school and I am just trying to get back into it again but I have definitely lost the momentum that I had earlier on.

School have been pretty good, they have given me five days in order to do some study, a couple of which I have taken, but even so, it is fitting it in really. But at the end of the day nobody can do some of the things that need to be done, as the girl isn't trained up yet, so it's a vicious circle.

The course has been good for me personally, I can now see where I am going or where I need to be. I can see what the goals are. I can see that probably I haven't been able to get where I want to be, but once I have completed the course, then ... I have lots of things that I can then offer and then obviously it is ... a question of how the school takes that on board and how they want my role to be in school.

It is frustrating but you have to leave it alone because if you don't you know that there is something else more important that won't get done. I can see that in regards to the health and safety and risk modules ... It is probably detrimental to the school but at the end of the day I have to weigh up where my priorities are and I must have a hand on the budget. That for me is a big thing, really, and I have responsibility for that and I must keep on top of that side of things. So it is frustrating but ... hopefully I will have the knowledge of how to change things, how to implement things.

BDP case study 7 (CSBM)

I am a peripatetic bursar working for this local authority in which I service five primary schools.

My colleague is a strategic manager for finance and IT in the education department in this local authority, and the peripatetic bursary service is part of her management unit.

First of all there had never been a full training for bursars as such. In the past the local authority have encouraged the AAT because the peripatetic bursar was traditionally a financial role supporting schools, so I was interested in the broader aspects of the course. The local authority supported [me] and another colleague to do this course and we have been given time off to work on the content of the course. And then once we have completed it and done our portfolios, we can look at the impact in schools and then look to further development for other staff in the future.

The [local authority] has traditionally put staff onto the AAT course, because if we are selling a financial service to school ... it is essential that we are offering [a high-]quality service, so therefore we want the right staff with the right qualifications out there in schools. Also thinking long term, and to career development for staff, ... it is important that they do progress with their qualifications. But ... the ultimate aim is that there will be some form of accreditation for the team so again that is another form of assurance of the schools that they are getting a high-quality service.

I think what I am gaining from the course is a wider context from the role of a peripatetic bursar so I understand the whole education concepts more. The main advantage is the resources that you have got, the building up [of] networks, building up contacts, and it is all beneficial for the future and for the future of schools ... I had the option of AAT rather than doing the certificate and I purposefully chose CSBM because I wanted to stay in education.

It has given me more confidence in my skills and knowledge level. It is not always easy to find the answer to things and I am pretty good at that anyway. You build up context through the years of health and safety or an [HR] issue. More and more I tend to be going back to the course content to have a quick look at what the course has had to offer. There are hundreds of websites linked within the course content and I tend to be going online, getting information and then coming back to the local authority. So then I have two sets of criteria to give my answers back to the school. So it has definitely broadened knowledge and skills.

Risk and facilities were the two areas [where] I have some basic foundation knowledge, but that was the steepest learning curve because it is not part of my role, although I see facilities management and the risk that goes on in schools – but I just haven't been involved in it before. So I drew, really, on experience from when I was a full-time admin officer in school, and then I contacted the local authority's health and safety officer ... Other areas, like information and communications technology (ICT) and financial management systems, I was fine with but you don't really see the learning in schools, in the classrooms so ... again that was a steep learning curve. I would go to the ICT coordinator in school and say, "I know about our side, but I don't know about your side, the educational side." ... I thought I was fully competent and I found out I wasn't. Ten months later I decided to do all of the templates just as learning aid for myself, and a lot of the things I was *au fait* with. But it touched on some areas that I wasn't so familiar with, which made me go and investigate, so building further knowledge.

I have enjoyed every minute of it. The only thing ... it is a heavy workload and I don't think that you are made aware of that. When we looked at the list, so many hours for this, so many hours for this, it is a hell of a lot more. I think that it might be because of the nature of the people who are doing it. You like to do the full job and everything has got to be just so.

It [has] perhaps a bigger impact in the primary school where it releases the leaders to actually get on with the job of education. They seem to be quite happy to sit back and let you deal with the finances and there [are] a lot of human resources issues now.

I think it takes the worry out of it and I think that it is a big thing if heads can trust your judgement and trust your reporting, and trust that you will keep them within the legal context. If nothing else it takes the worry away. Its one less thing that they have got to be concerned about. We are finding out more and more that they are coming to us with human resources issues and initially you will be doing the costings, what it will cost to bring in a new teacher, or managing sickness deficits. But even to the point of drafting up the letters to the local authority, ... I find that we know what human resources need ... to make sure the contracts are correct.

I think the primary heads do want the service more, and what we are finding is as more and more of the older school admin officers are retiring ... then [the heads] are on the phone, ... can we have the 'peri' [ie peripatetic bursar] now? And they are buying more admin, they will buy a peripatetic bursar who is an admin support person as well. So ... they get two for the price of one basically. It is amazing really in how many of the old schools, the admin officers are still there.

As a primary person, I think my worry is that we will lose all of our good staff to the secondary schools, they pay so much more. That's the natural progression. It would be nice to be able stay within the primary sector but it is not feasible for a lot of people.

BDP case study 8 (DSBM)

I became a finance officer in 1990 in what at the time was trumpeted in the paper as ‘Schools wasting money on finance people’. The job that I applied for was actually pinpointed in the *Reading Chronicle* ... as a school wasting money on administration. That was at the largest primary school in Reading. Prior to that I’ve done a variety of ... things in my career. I have been an invoice processor, I’ve been a payroll manager. I’ve done ... lots of different things and obviously was fairly computer literate up till then, but I had four years off, then I just did some temping work in the summer before, and then I applied and got this job. So I was quite pleased because there were 106 applicants for it.

I stayed there as we grew tremendously ... when I first started there we had petty cash, you know, £50. We had no cheque books to speak of, we had ... an interest account; there was a small amount you could spend but not very much.

... it wasn’t Reading in those days, of course, it was Berkshire. Berkshire [was] one of the first authorities to ... make more autonomy in schools, and provid[ed] us with our own bank accounts and our own ability to do whatever we liked, and to give us as much money as we could have coming into our accounts each month. So, slowly the whole thing was devolved to us or delegated to us.

So I was able to grow with that and learn as I went along. During that time schools were taking on bursars quite a lot. I got very involved with the authority in giving presentations to new bursars and helping to train them because I’d been one of the first.

Then I was given the compliment of working for Reading Borough Council. The Council hadn’t got school knowledge because they’d never had schools, and they were looking at a software package that they wanted to roll out to have in schools. To give them their due, they did the right thing and ... invited three bursars onto the working party ... and I was seconded into the accounts department one day a week ... giving them education, knowledge and also two days working on the new software project, and so I was three days out of the office. We had somebody else in to do some extra work. So that was done but that really unsettled me. So I decided I needed to look for a new challenge after that and this job came up and I applied for it and got it.

Obviously I’ve been fairly high profile over the years with the additional delegation of payroll and personnel services and things like that. I was the chair of the Reading group and I organised a conference for heads and bursars. That was while I was still at the primary school. So the head here would have known me quite well from there ... I also went out to all the primary schools, to the heads’ meeting and gave more information. But I suppose I have always been quite involved in my job and [helping] other people. I’m less help now, funnily enough, since I’ve been in the secondary sector, because there [are] so few and there are very different issues.

In Reading secondary schools it's a nightmare for the heads ... because they have to go onto every committee (because there are so few of them) ... There are five times as many primary schools as secondary schools and there's always been this argument over their standards. So those secondary heads have to be very careful, or else ... they will not have a voice in the discussions that go on.

Five years ago, [in] 2000 I came here and initially [the job] was called bursar, but it didn't include sites and buildings ... it was really just finance and personnel. But it was with a view to it being the full business manager's job and that was what was supposed to happen but has still hasn't happened. They're still talking about it. So I'd taken on sites and buildings since I came here, and health and safety, I do finance, I do personnel – but what I don't do is I don't head up the support staff in total. Obviously I've got some support staff [who] report to me.

The number of teaching staff is about 83, we're about 138 staff in total. I have four technicians, an art technician, two DT technicians. That's it. ICT is a different thing again and how that's going to go in the long run we don't know, but the ICT is managed by the head of ICT curriculum. Site staff: I have 10 cleaners. I have one part-time gardener and four full-time [gardeners] on site all day ... and another cleaner on site all day as well. There are nine of us on the Senior Management Team. We have 1,100 pupils, give or take. It's going up even more, we're taking in from September 240 students and that's big, whereas normally we are taking 180. We became a specialist college last September.

They're doing a big management review here because of the new teacher's pay and conditions document ... our head is very heavily involved in workforce modelling and he's actually seconded to the authority for two days a week. He's doing a whole-school thing and not just teaching staff. So we are sort of backing things around as to what he's going to do with the school manager, that's what he's calling it at present and that is what I want to do.

I still find it quite difficult because of the different management structure for finance and admin and with all the changes with exam invigilators; somebody needs to have the overview of all of that. The technicians need to be included in the school more.

The new management structure's probably going to change all that and [we'll] have a head of attainment and head of innovation, sixth form and something like that. So it's the sort of structure that we're looking at and working through now.

I certainly feel that I am a full member of the strategic team in school. There has been an issue going on that I don't agree with recently and I have been and argued with the headteacher on that ... we haven't actually resolved it yet, but I do feel that certainly I can say what I want to say and I can do things off my own bat and I just produce procedures and things like that for them to ... use as a group. So I manage my own structure as well and do what I need to do.

They would come to me for the financial, but not just that because ... there are so many things: audit scenarios that I would have to do for them, like “we want to have a new structure for student behaviour” or something like that. So strategically I am involved ... I’m not with the very senior staff which is the head and the deputies ... that is the real strategic hub ... of the school. I then get pulled into that more often probably than other people on the management team, I get pulled up to and asked, “So how do we do this?” At the governors, the head might ... clarify a reason for something that’s in the finance report within the meeting, but by and large I give the finance report. I have a good relationship with the governors and obviously I have to deal with health and safety because we have to do health and safety.

Probably the impact of DSBM has been limited here in school because I was ... working at that level already, because I was on the management team. Also I take on more than I’m supposed to ... anyway. So I think ... within the school there’s been lots of impact and I have done things out of the DSBM, but within that bursar group in Reading of which I’m the secondary chair, probably a bigger impact in that. I’ve been able to support colleagues and so the impact has been with colleagues from other schools.

[The course has] certainly given me more information sources that I found, which means that I’ve been able to share that. Reading Borough Council would not tell you there was such a thing as a CSBM or a DSBM. They just haven’t got a clue. Reading is a hopeless, really hopeless authority, brought about by their lack of support really, and it’s quite a difficult authority. So, what we have in Reading is our own bursars’ meetings of which I’m the secondary chair, and [I] have two primary schools with me and we organise that once a term ... we do quite a lot and we get quite a lot of phone calls from colleagues.

... Reading is such an unusual set-up, the schools forum has to have secondary schools’ heads on it and of course they’re supposed to have deputies if they can’t go. So, when our heads ... were on the schools forum, we were their deputies at the meeting ... except we’re bursars and bursars cannot be on the group. So I wrote to the Wider Workforce Directorate at the Training and Development Agency for Schools (TDA) about the makeup of the schools forum. The headteachers that were on the schools forum were there because they had finance ... “Oh, well, heads do know what goes on in their school,” but they don’t know any nitty-gritty and we would ask questions that they might not think to ask. So they were really thrilled to have us on there and that’s why I wrote to Charles Clarke the Secretary of State when he was there and he passed it on to the TDA.

I am fighting hard and I’ve just been invited to be on some other group ... I’m one of those people that they do contact if they want some information ... So, I suppose I’m high profile in that I ask hard questions sometimes.

I think that the major benefit of the DSBM is networking and what you learn with loads of other people. To be honest with you, all of them are doing wonderful things and you do learn an awful lot from them. I think the biggest impact I’ve got is the network. That’s the most important thing that comes out of it.

There are no other jobs like this in the land. It is such a varied and such an interesting job and working in schools is also worthwhile for yourself as well as providing a very different environment: We're still having to push the boundaries the whole time but there's a huge amount of experience and expertise amongst the bursars.

BDP case study 9 (CSBM and DSBM)

The school roll has risen, it's now 37 and at Middleton it's 60. It's a two-class school, it's divided into [Key Stage 1 and Key Stage 2]. The exact distance between here and Middleton is five miles across the back roads.

The schools did have this big cloud because everyone thought that it would close and now people realise it hasn't and in the last 12 months we've increased our numbers by 6 which, in a school this size, is huge.

I have been the business manager since 1 April. The head and I actually started at the two schools on 1 April but we didn't actually confederate till September, that's the new academic year, September 2005.

I joined Middleton, which had its own issues in the office at the time because [a] colleague ... had died [after] long-term sickness so that was another challenge ... while I was doing that I completed the CSBM and luckily the head was being very encouraging in the DSBM which I went straight on to. I know now you need a six-month gap ... but I went straight on to the DSBM and I'm also doing the AAT as well. I didn't particularly want to go into a big school and one of the wonderful things about working at a small school is that you do see the children, I know all the teaching staff ... I don't want to become an anonymous business manager somewhere. The admin officer, who had worked here long term, retired at the same time as the previous head. It just all ... fell into place and it just seemed an ideal opportunity.

If the authority had proposed to close the school the community would be mortified. I think it would have caused really grave problems. There's no village hall or anything ... So confederating was a real solution.

I work full-time over the two schools and ... I normally have an admin assistant at Middleton for the morning and then an admin assistant at Beswick ... but the Beswick one's just gone on maternity leave so the admin assistant at Middleton has increased her hours, she's gone more or less full-time. When she does come back from maternity leave maybe the three of us should keep mixing again right across the two schools as an admin team for the two schools ... one of the issues [is that] you have got to be very aware the two schools were very different so I can't just walk in here and think right this is how it was done at Middleton, this is how we are doing it here. We're still keeping the two separate styles and gradually ... bring them together with the best of both systems.

I hold regular half-termly teacher assistant meetings. They are over at Middleton basically because we have more teaching support assistants there ... they have actually said what a positive thing that is because ... they're still a little unsure about speaking with the head.

Confederation allows you, I think, to be more creative with your budgets ... because we've got two budgets. I am very fortunate with my headteacher: there are so many headteachers that ... the one thing they would cut back on is administrative support. And ... they don't seem to think who can support them.

[Our] biggest thing ... is the confederation ... we don't have two heads, which would take up quite a lot of money. This is why we still have two budgets. We've managed to keep two individual budgets but we've shared out management costs because the head's and my salaries are shared between the two schools, which is why we could afford for me to be paid at the scale that's right ... it's enabled us to keep three classes going ... so our Key Stage 2 at Middleton are split into Years 3; 4 and 5; and 6. We've got a very professional team, we've got well-qualified teachers, well-experienced teachers that we can afford because of confederations. We've got confederations because I've done my part with the business manager [role] which has supported the head.

As a school secretary with a very knowledgeable headteacher at the time, I still did CSBM. I actually found it on the internet because the local authority did nothing to promote the CSBM at all, and was very negative about ourselves.

So, I actually went to my headteacher ... and said, "I've seen this, I'd like to do this" ... Well, first of all he laughed and then he said, "Well, if you want to have a go we'll let you," and I got a letter from the two of them and then to their amazement I got on the course. CSBM was fabulous really; I think everybody should do CSBM ... it did enable me to become a line manager ... I became more challenged with DSBM, we did the first cohort. I thought it was top drawer. The knowledge it gave me ... meant I could go ... back to my headteacher, "I can do that now ... I can take that workload off you."

The DSBM is a lot more management and it's more about the future of the schools. CSBM is more the day-to-day running of the operation. They are completely separate courses. But ... even if the school has a strong management team I think everyone should have someone that's done CSBM, definitely.

I actually do think that for schools like this a business manager is essential for a headteacher. I know the head has to deal with so much and every other small school is the same, and that is why you're getting so many headteachers off with stress. They cannot possibly do everything that's being asked of them, and I do really believe ... that the small schools are the ones that need a business manager more.

BDP case study 10: headteacher comments (primary)

The course has given [the SBM] that breadth of knowledge of the teaching and learning side ... I think what has come out of this course is that she has broadened her knowledge on that side in terms of things like performance management, the school improvement plan and more involvement in that.

What makes the difference, really, is the course. It gave me the insight of how the bursar role can be developed.

I think that at long last it is recognition that there is a huge variety of secretary–bursars out there. Her completion of the course is a point of qualification and recognition that her skills are very different from the view that bursars do registers and dinner money.

I think ... from my perspective, as a new headteacher who did the [National Professional Qualification for Headteachers] (NPQH) three and a half years ago now, that the model of this course is very similar to NPQH. It is very rigorous and so it should be if it enables the bursar to be part of a management team, which is what I think it should be. From her perspective, she is in very different situation. So the hat that she has to wear, from being in a small primary school, is very different from one of your colleagues who is from a large high school. A very different role really; in between her doing bursaring and dealing with parents, she is my front-line lady: the contractors, the caretaking staff, the teaching staff, she is wearing so many hats and I think a course like this is an opportunity for the rest of the staff out there to realise the skills involved really.

In an older building like [ours] with the contracting that she has to do [it] is a huge job and ... if I was doing that it would detract me from my priority of teaching and learning. She is superwoman, this one. She is my PA as well; she is the lady who with a parent on the doorstep will make a judgement on ... how to deal with that. She is the lady who is continually out there on the front line. She is also the treasurer of the PTA. She does a lot more. In bigger schools you would have a learning mentor looking after the attendance. She's the one who monitors that for me and does the half-term attendance certificates for the children. She very much wants to broaden her skills and has recently launched into assessment.

She is a governor of the school which gives her a wider role. It's incredibly useful for me, that she can bring not only her financial knowledge to the governing body but also her knowledge of the community, which is very strong. A lot of community groups use these buildings and she coordinates that as well.

Unfortunately, at the moment trained bursars are thin on the ground. I have been very fortunate here, incredibly fortunate. Her reputation spreads far and wide throughout the authority. She does all the reports to governors and as she has said she is a governor and has inside knowledge as well. But there are many primary schools in this city where the finance officer comes from the authority to report to governors without that inside knowledge. I have been incredibly fortunate.

I think that in a primary school particularly, my key role should be looking at the quality of teaching and learning. I think that you should be able to trust your bursar and to work alongside. I have come to the thought that we need to impact the performance of literacy in Year 2, for example. Have we got the financial resources? I would like to increase the books, which is exactly what we did. We looked at an action plan; she looked into it, where the sponsors would be and how we could manage it together.

Actually as a headteacher who is more than a little shaky on the financial side, having somebody on my management team who could input financial knowledge into my school improvement plan, the two would be meshed together much more closely than they are, purely and simply because I haven't got that skill. I think that's definitely the way forward.

When I first came to this school, I said to the governors, "If need be I can teach anywhere in the school, if need be I can go out and clear the drains." But if I have to do what my bursar is doing you would need to take me off all of my other duties and I would need intensive training for a very long time. So my feeling is very strongly that we respect all this knowledge and expertise and that she should be paid on an appropriate scale.

From my perspective, coming to this school and speaking to the previous head, I knew that we had an absolute treasure here. I have seen from this course the extent to which her confidence has grown in her own ability. We always knew she was highly skilled and I wouldn't say that she is bossy but she has become more assertive.

I know that my bursar is top notch and if I hadn't been working with one then perhaps I would have had to make more of an effort, but then that would have detracted from teaching and learning.

BDP case study 11: headteacher comments (secondary)

In terms of how we are going to develop, she has got an important role in that.

I think with her role, people refer to her as a school bursar but she is in fact school manager, which includes responsibility for being a bursar. As she will have told you, as head's PA, it is a very important position because of confidentiality and keeping me on track. What we are actually finding is that the day-to-day responsibilities involved in being my PA is hampering her from doing the more strategic roles, which is part of her job which I want her to concentrate on. That's one of the reasons we need to steer away from people's job descriptions, those things that take up a lot of time on a day-to-day basis such as head's PA. So removing this responsibility from her remit, we are hoping that this will free her up to follow through with more school management responsibilities. What we are looking to do is make an appointment of office manager or headteacher's PA, so that she has the opportunity for more of a strategic role, where I can see a big input coming. For example, we have got a meeting with the architect next week and she will be involved in that.

As such she has always been on our SMT – which we are looking to redesignate a school leadership team – and I think that is important as well, because she was playing an important part, not only in terms of keeping us on track in finance but also in helping us to apply heads strategically. Amongst the things that she has already done is to put together a three-year plan in regard to the budget so we are not going on an annual basis. I can see a lot of benefits in terms of having her on the management team, particularly in the strategic planning because, if she can see where we as the management team are trying to take this school, she knows where all the finance fits in with all that as well as ... ancillary staffing. We can input into what she is trying to do with the budget, so we have got that direct contact which can only be beneficial as far as I am concerned. She has a key role on the staff.

So, for instance, as a team we're away next weekend as a planning weekend and she will be involved in that, she is part of the team so she is part of that planning weekend. Certainly she is not just there to take minutes but as an actual working entity.

I see her doing her job very effectively, which clearly shows that she has a good background and good understanding of what she is doing. And it gives me absolute confidence in the minor points of judgement ... I do know that she brought with her a good level of experience prior to joining this school, so that in itself has had a part to play, the financial background.

I can see that through releasing some of her time, it will let me be the head that I want to be.

BDP case study 12: headteacher comments (secondary)

I have been head here now for 21 years and it is a pity it didn't come 20 years ago. I was laughing with staff a few weeks ago. When I started here ... I literally had £30,000 that I was responsible for and that was it. The authorities spent it and other people spent it. The actual money that I got to spend here and decide how it was to be broken up was £30,000. Now 20 years later you are talking of £3 million. Obviously, I know the training of heads ... is changing and rightly so, but again financial ability and expertise is so important. Your premises [are] massive ... we had here the bringing together of two schools which were on separate sites ... That was undertaken by a deputy head with teaching commitments, and me. Now again you look and say, "If we had had somebody like our bursar, with the time and everything else, maybe they could have handled much of this."

What we have done here is move to a business manager model and the way we have done that is that we see our bursar as part of the senior management team in school. As such she is very involved with governors and external agencies. Looking after the wider areas of finance, computer administration, the premises, those are the areas that she has been given responsibility for. Then that frees up the deputy head and the assistant head to concentrate on the educational side. They are both interlinked and they are both absolutely necessary, one for the other.

Obviously as a head you do spend a lot of your time with non-educational aspects of the work. I think the way that this has gone here for the last two years has been very, very useful because now at our weekly meetings we are able to talk about the strategy with, say, funding and where we are going and what the plans are etc. Rather than me having to get into the nitty-gritty of day by day, I can leave that for her to pick up and then at a future meeting we can bring it up and review it, we can talk about it and she can bring up concerns or things which she might need further guidance on ... and we can move forward. Likewise with premises, for example, we are having a lot of work done with the ICT infrastructure, so ... we can talk about that, what is needed from the educational side, what is important for us etc. Then the day-to-day contact with all of those people, which could take up hours of the head's time, she's now able to do that. Obviously when it was done by a deputy head, the deputy head would be watching his watch, saying, "I have class eleven five in 10 minutes so that's all you have got," or he is saying that eleven five will have to wait while I finish off the business here. She hasn't got that pressure. I am not meaning that she is not doing anything; she is very, very busy. But she has complete control to say that today it is this premises matter which is important and there is no teaching in hand.

The strategic development of the school will be helped because she has the time to begin to look at the financial side of things. You are always, as a head ... working in those areas trying to get some time to look at the cost-effectiveness of these three, four different aspects, but pressures just came and it was "Right, let's just do that." But she has some time to be able to say, "Let's explore this" and then come back with a much more considered view and say "I have looked at all of these, these are the pros and cons of these three here," and I think that you make a better decision, a much more informed decision.

So why did we send our bursar on the course? She has been in post for coming up to two years, a new post established in the school to deal with the non-educational aspects of school life at a senior level. We felt that she had good experience, particularly on the finance side, but there were other areas and aspects of the job that she needed more training, help and support with. And we saw that this was one opportunity of meeting with similar business managers ... at a national level to look at good practice and an opportunity to develop her own knowledge and expertise, and that is basically the reason.

I think she herself, from my discussions with her, has found the course useful. I think she has found interest in the actual content of the course and I think she has also found it very, very useful with the people on the course, and the network she has been able to build up of people, so that when there are questions or whatever ... she now has people she can tap into, people she can share ideas and talk with. I think that the school reaps the benefit of that as she is seeing good practice at other establishments and she is able to transfer that back here, adapting it as necessary for use here in the school. So it has been a very, very positive experience, hopefully for her and the school.

Has it made a difference and impact? Yes, as I say I think that she has picked up a lot of useful contacts so that she is able know to get ideas, bounce ideas around, see what good practice is taking place in other areas, and then brings that up in our discussions here. And again she is the kind of person ... that ... doesn't feel fazed or lacking in any of our meetings, as some people might be if you have got five senior teachers. She will fully take part in the discussion. Yes, occasionally there might be areas that she feels are very much educational. But even then she is happy to say that, as a non-educational person listening to what you are saying, with my hat on it looks as though this is this, or that is that. That is a very, very useful viewpoint to be able to feed into, very, very valuable.

All of these things are really very, very demanding of her time. We have just been [talking] within the school about her being the business manager, you are then looking for training for the people just under that level in the office system to get the skills as well really.

BDP case study 13: headteacher comments (primary)

I was already working with NCSL on NPQH with the Eastern Affiliated Centre and so I knew the course was coming up. I think it's an excellent course and forced [my bursar] to go on it. Her confidence has, as a result, grown absolutely tremendously.

I give my bursar a lot of time commitment and support as her mentor and I think other heads should be required to go to the taster sessions and realise what the time demands are. The benefits are tremendous. For example, what we've discovered through the benchmarking site is that we're low on admin hours. At one stage we were thinking that we must be incompetent because we couldn't get the work done. Everyone else seemed to be managing. She was able to gather evidence which showed that we were underprovided for, and so made a case which I was able to put to the governors for more. So I'm delighted with her.

She's thinking strategically now, she's taking far more of a leadership role. The other day I overheard her talking with a midday supervisor and she was telling her about why we do what we are doing ... she's got into sharing the vision for the place – she's walking the talk.

The new systems she's put into place are all making us more efficient, which frees us up more and better for work with the children. We've done Investors in People (IIP), she pushed me into doing this because it was her idea. Having worked previously in a health organisation which had IIP she had seen the benefits there and thought it would be good for us here too. Her view was that it would help us all to go in the same direction and this would help with school improvement.

She's realised that as she thinks more strategically, she's going to have to delegate more of the lower-level tasks. To help with that sort of tasks, we've increased the clerical assistance. The new clerical assistant has been trained by her and together they produce a critical-path analysis of what was needed.

She's developed the new phone system here and set up the answerphone system, which is great for recording absence. She's reorganised the school office and fixed the dinner money. With better absence recording we can now celebrate attendance every half term. Most recently she's got onto doing an asbestos log. Her understanding of risk is so much greater as a result of the course. She really understands the organisation so much more, she's more assertive and line manages the site staff very well.

Overall, in terms of her understanding of the organisation, this has deepened so much. She has been tremendous, she's now seeing that she can take control and move areas forward. The new head will be really able to rely on her.

BDP case study 14 (CSBM)

I am the administrative manager, which is a new post created when the new head took over ... He came in 2001 and I came in 2002. We have got 370 kids on roll, 24 full-time teacher equivalents, about 30 bodies. The support staff consists of four of us working in here [the office] and two additional ladies who are at the age to retire, three technicians, two general teaching assistants, three cleaners, one caretaker. Grounds are contracted out. We are down to five midday supervisors.

When the school started out it was purely a Roman Catholic denominational school but about 11 years ago, with a falling Catholic population and a desire by the Church of England to have a school for their pupils, they joined forces together. We are voluntary aided, and the head is hoping to achieve specialist status. We are about to have a new school built at a cost of £7.5 million.

We will be taking on the examinations later on next year within the office but my staff need training. Even the two new ladies that we took on have no real previous school experience, again very low paid, on scale 1.

Originally I wanted a career in banking where I used to put money in the overnight treasurers, I dealt with millions every day so money doesn't frighten me so long as you can account for it, that's my main focus. Then I had four children, which took me out of the workplace for 10 years. Then I went back to work as a woman returnee and I have obtained updated office skills, learnt how to type. I thought the only place I could work with four children, low paid, is in a school. So I started off as a clerical assistant doing very mundane tasks and then jumped at an opportunity when a small primary school was looking for a new secretary.

I stayed there for 10 years and in that time the headteacher was off for 2 periods of long-term sickness of about 4 years. [This] was very difficult for the deputy head who was also teaching a reception class, and she left a lot of "can you do this, can you do that". So, in the part-time hours that I was there, I gained a lot of knowledge about running a school and what goes on in a school. She gave me a lot of responsibility to follow things through. And as I became tired of that, thinking I was underpaid, overworked, what else would I like to do.

I went for an accounting technician's course and qualified as an accounting technician, thinking that I would use that to leapfrog me forward. I found my age against me, because at all the interviews I went to everyone was a lot younger than me and had more commercial experience in accounting technician work as opposed to very limited [experience of] income and expenditure of a school. So I thought, "OK, schools I have to stay in", and then this came along.

When I came the head said this would be a developing role. I am probably quite pleased about that because I had just arrived here and was trying to settle myself into the practice which was going on here. They didn't have a finance person on site; it was a governor who did it for them. So the clerk who was inputting the invoices and pay would copy anything financial for this governor to do remotely. They have managed extremely well, but it has been extremely difficult. The headteacher just did whatever the governor recommended. He is an ex-bank manager as well so he knew what he was doing but it was totally unsatisfactory for a school in this day and age. Two ladies had been here for a number of years so they knew everything, but they had limited data for staff on computer, very limited student information on computer; no test results on computer; attendance wasn't on computer, and this is when I arrived. So it was a wonderful challenge.

There have been a lot of things to put into place. There is a lack of documentation and things are beginning to get documented. I don't know how they got through the Ofsted, I really don't.

When I first arrived I focused on the finances because that was my immediate role to take that over from the governor and the other clerk who had been processing. I focused on learning the county's integral system, having to relearn the accounting system ... I am still inputting invoices, mundane tasks which need to be delegated. In the finances I do the budget planning and the monitoring and reporting. I directly manage the office staff but any issues arising with the support staff, they will come and see me first. If I cannot deal with it, I will report it to the headteacher; we will work together on it. He will direct me.

What I have tried to do very quietly is introduce new things now. We have got an old school. The caretaker didn't take any readings on the electricity, he does now but I just assumed that it happened so to get him to do these little tasks will be helping us. Nobody knows who holds which keys to what, or who holds a front-door key. Everyone seems to have a copy of it and it means that sometimes somebody will be in school and someone else will come along and turn the alarm off, but they have actually turned it on again. OK, we have only got another year in the old school so it is not necessary for me to start changing who has got what keys. We'll have new locks on the new building, so they won't be given a key without me knowing. And I'll have a key inventory.

Health and safety didn't appear on my job description but kept landing on my desk. It's on the deputy's [job description] but he is an experiment and you would think that he would be fairly keen – but not really. I went on a course with him and it was, "This is common sense." Yes it is, but you do need to document and show that you are doing these things. So it is the documentation part that has been lacking ... the school hasn't burnt down so things have worked but it [is] not shown on paper that it is all in place. People do come in and say this fire alarm wasn't on in one place, and the health and safety policy hasn't been circulated to anybody in the last five years. The hard bit is seeing where to start because this school lacks so much, there is just so much.

Health and safety is the priority at the moment and we have a governors' meeting in a fortnight's time, where the health and safety in education policy will be approved. I feel that you cannot make any progress until everybody has actually read this health and safety policy. I cannot get risk assessments done in the classrooms because heads of departments don't feel that it is their role to be doing risk assessments.

The county peripatetic bursar ... came in to oversee if I am on the right lines and gave me a lot of support, when I first arrived, to learn county ways. She hadn't heard of CSBM at all which I was a bit disappointed about, because I thought everybody knew about it. The head didn't know, but he was very keen and [CSBM] has come at the right time.

My reason for wanting to do the CSBM was to give me confidence; I have always been a very shy person and often wanted to say my opinion but felt just not confident to stand there and put my point across. So I wanted to have something behind me. I am fine in finance but [on] the rest of the things in the school ... I am still a bit vague, but as a result of the course, I know where to look for the information now and the internet has been a wonderful tool.

The course helps you in the wider tasks of school management. The talk2learn site was excellent. The support given by other members was very good. We are still in contact. I went to the first residential [session] thinking, "I am going to have such a headache, we are going to get so much information crammed at us in two days," but it wasn't like that at all. It was a very pleasant surprise. It went at a fast pace but it was all delivered. It was new information but you could see the jigsaw, it was all pieces of information but you could actually see the whole picture and why you were doing one thing to support another area, and this idea of a whole-school vision: that the teachers couldn't function without the support staff and the support staff wouldn't be in the job if they didn't have the teachers.

We are trying to work on the governors now in getting them on board because they turn up to meetings, nod their heads, point out the spelling mistakes and don't move forward, not a lot of active participation. One or two are switched on, helping get the committees working. As a result of the course, where I was covering risk, I could say, "Oh, look what I have done this week. This is what we need, and have we got such and such policy in place?" There is a distinct lack of policies, a distinct lack of review here.

There was recently a very nice governors' information evening so I dragged along the finance committee chairman who is only temporary, unfortunately, he is shortly to retire, leaves the governors in August. I dragged him along and [we] listened to the delivery of the new financial regulations. They emphasised ... the contract. I thought, 'That is great, I have an accomplice now, who knows what I am talking about when I say, "No you just can't place orders for £20,000 just because we have the money in the account. You just can't do that."' They don't seem to understand financial regulations and that you don't cross them.

The new build is going to cost £7.5 million. It's not peanuts but it's not enormous, especially compared with what I was used to in the bank. It's a nice figure, that doesn't frighten me at all. We have to raise £750,000, 10 per cent. I am involved in the design team meetings. One of the staff has been dealing with the specifications, so that they know exactly how much we have to spend on buildings and how much we have for fitting out the interior, so he has specifications and quotes on costs of fittings and tables and chairs. But we then have to go to tender for the smaller contracts so we will be getting together on that. I think the new school is a big burden on my personal development. I can develop within the new school environment but it is not entirely what I would choose to do, except that it is happening. So I will develop within the new school organisation because the new school is a great opportunity to develop all of your systems, and I would have to prioritise what I want in place.

My focus initially is going to be more on the financial side, equipping the school. Then I can see it being premises related. Once the school is built, I can then focus on the teaching and learning side. As we go along, I would like to be involved in that in some way, to understand it, because obviously the finance impacts on it.

I need more money. I am very poorly paid for this job but we are limited by the number of pupils we can have in the school. But when we get our new school we will have the capacity for 450 pupils, which still isn't a great deal but I am looking for some more salary. The pay is an issue because I am low paid so therefore I have no status. I am happy I have come to this job, and take the pay. But I do feel that it is a low-status pay and everybody knows it because they all know what my job was supposed to start at.

It is like a classroom in the staff room. I go in there with my red book, because I have got a red book for invoices, to say that someone has received the goods. I go in with my red book and it is, "Oh, here it comes, this is my life" [a reference to a television programme involving someone's life story in a red book] and I get ribbed to death. Or "Oh, here's trouble, look smart." They don't treat me like a person, they see me only in the work capacity and I have been down to eat my lunch and I have been ignored.

The job needs a higher status, recognising that I am the cog, I am actually the person in the centre that can have an impact on what happens in the classroom, what happens to the support staff, what happens to the governors, what happens to the parents. I am the central point that everybody can feed into, and I am not saying it is my job to fix it but I can bounce it off and make sure that it has an impact on another stakeholder. I can deal with the governors at one level or at a practical level right down to the cleaning lady.

BDP case study 15: local authority peripatetic bursar manager

I think that traditionally we've put staff onto the AAT course, because if we are selling a financial service to schools ... I think it is essential that we are offering a [high-]quality service, so therefore we want the right staff with the right qualifications out there in schools. Also thinking long term and to career development for staff, I think that it is important that they do progress with their qualifications. But also, what my ultimate aim will be with the majority of services that I manage [is] that I want some form of accreditation for the team, so again that is another form of assurance [for] the schools that they are getting a high-quality service.

We do have a number of bursars who are currently on the AAT programme and it is recognised as well, because from that you can move on to the full chartered accountant qualification as well, so it is another avenue for them ... if that is what they want to do. But it does give them a good basic grounding in accountancy and I think that a lot of the finance work in schools now is complex ... it is not doing basic bookkeeping any more. So with the AAT it is quite simple enough for them to progress if they want to or to come back into the centre, because it is a qualification that we apply to a certain tier of financial posts within the department, so it does give them an opportunity to come back in as well.

We take responsibility for the management and the quality assurance and the training of the team. They have got some confidence that what the bursars are doing is accurate and reliable and consistent. I think the primary heads do want the service, and what we are finding is that more and more of the older school admin officers are retiring now. But as soon as they retire then the heads are on the phone, "Can we have the 'peri' [ie peripatetic bursar] now?" And they are buying more admin, they will buy a peripatetic bursar, who is an admin support person as well. So from there, they get two for the price of one basically.

From my point of view what we need to do to basically evaluate what the peripatetic bursar has got out of it. We need to compare this course with AAT and see if they have got a future with it, going on to the diploma level which is more pertinent really for our service. It could be that the role of the peri needs to expand beyond the pure finance role ... but that is something we will need to check and evaluate, something we would need to consult the headteachers [about] and see if they think that there would be any benefit in buying in.

We have had to cover the sessions that the peripatetic bursar attended; we have to cover all of the sessions. I think that one of the things is that although our bursars are financial bursars, and Hilary has covered the wider aspects of management now, the local authority does have policies on absolutely everything. I think we are all open to all ideas that come from it.

I think that it just ties in really nicely with the remodelling agenda, and we are doing a lot of work, colleagues who work there and in this building, on the teaching assistants and the different levels and the skills that they need and what they should be paid and new salary scales for them all. The peripatetic bursar has been in touch with the colleague who is responsible for all that. It will be built in and I think that when you pull it all together ... it is raising the profile of the non-teaching staff in schools because for years and years and years they have been second-class. There is a professional arrogance with a lot of the teaching profession. So all this goes to increase the status and the standard in the school and to give them the rightful position in a school management team where they do a key role. You make a mess, particularly on the finance, and if the finance goes wrong then they [schools] are in big, big trouble. Staff morale goes dead and you might have to lose staff to balance the books. So bursars are real key people and they deserve to be recognised. Where SMT are making decisions and don't deign to tell the bursar, very quickly they lose control: an extra two or three appointments and you are over £100,000 adrift.

View of heads and bursars

With the heads that I work with on a one-to-one basis, I get that personal feedback on the individual bursars and they are a real, valued asset in the school, and that is shared. The heads know, the heads that haven't got them, they have either got quite ambitious younger staff in the financial side, who would be ideal candidates for the national bursar course, who are trying to carve a career and a future for themselves in school management. They will start off in primary and then progress into a bigger secondary school, and there are a few of those around.

Headteachers go on the NPQH and it is like they are talking Chinese to them, and they will do the stuff to get through the course but they don't really understand it, as there is no context. It is only when you sit them down with a budget they go, "Oh yes," and you can see the penny dropping. We do deputy head courses as well and I go and do the finance sessions as well and it is like opening Pandora's box for a lot of them.

... I have seen trouble happen in one school where they got themselves into a muddle because they had funding coming in from all the different sources. They appointed a business manager who came in from the banking sector and wasn't *au fait* with local authority accounting requirements. He set up his own systems and just got himself into a mess and ended up in £211,000 deficit which they are just crawling out of now. He spent a lot of his time focusing on trying to get in all of this money but he lost the plot on how it was going to be used. It was at a school where he wasn't a member of the SMT; so he was telling them that he was bringing in all of this money but they were making the decisions and spending it. So it is all about needing the systems and structures in place and the knowledge at the same time as well. You can't afford to not have a bursar.

BDP case study 16 (CSBM Primary)

It's a village school that's not to full capacity because we had another school in this village which takes some of our catchment children. The school is developing, moving upwards, lots of decoration happened recently. I've been here since May 2000 and came as a part-timer, and I now work from 8.45am 'til 5pm every day during term time, and I've got a helper for six hours in the office.

It was my previous head that left on 31 August who handed me the information on the course and said, "This will be good for you." Then the new headteacher arrived and she has also been supportive.

Prior to children I was in secretarial employment, we actually ran our own hotel. And then just by chance the local primary school that my children went to had a vacancy for a school assistant, so I started there and must have been there four years and then this opportunity came along.

I do all the finance. We're now a cheque book school so I'm responsible for raising the cheques, paying invoices, getting to sign the bank statements and obviously everything else that goes with making the orders etc with finance. Personnel: I tend to keep the database and send off for references and all payroll forms. In the office we are responsible for the dinner money obviously, the collection of all cash and banking up, and general secretarial work in the middle of that somewhere.

We have eight [teaching assistants] (TAs).

I enjoyed CSBM, I've learnt a lot. It's definitely changed the way I think about things and have done them, especially before the risk module. That was a case of, "Oh dear, somebody else can do that," and pass the word on. I'm feeling more conscious of the way I think and who has to be responsible for certain things. It has been a huge learning curve. I think if anything I would have preferred it if my particular cohort hadn't started a fortnight before Christmas but there's never a good time, there'd always be something.

It's lucky that there's the holiday's coming. It's the financial year end ... what with working so much here and teenage children as well, with their demands, I felt that it was all going to get on top of me. There is more light at the end of the tunnel now because the holidays are coming and I have more time to concentrate during the Easter break, and again that was a lifeline because I was able to come here and do the work without any interruptions.

The way I've been able to re-think, the way I feel about myself, it's definitely given me more confidence. Whilst I was aware of all the aspects it has increased my knowledge of everything, especially areas like facilities and risk.

I've been very lucky with the cohort I've been in, and five of us have actually been meeting up every fortnight. Since the last residential [session] we've been able to help each other because we've all at some stage struggled with something. You go in with the idea of looking at the finance module together to see what we think, but by the end of it we've actually done a bit of networking.

The accommodation was great, the support's been good ... I know the way ours has worked, we've had December, February and April and I'm not going to assessment until October, which is my own choosing. I've always thought summer holidays were ... when I will concentrate and get things finished off. At the first residential [session] I was absolutely terrified of standing up and talking to people. By the second residential [session] I actually managed it; I didn't like it but I didn't feel as if I was going to make a complete idiot of myself so, hopefully, come October it will be OK.

My case study is on a new telephone system for the school.

There are a lot of things that I am going to do: we haven't got a crisis management kit and we haven't got a couple of other things. More work here on facilities; making a folder with all the certificates in.

I think in the long term I've got to go more into finance; I'm actually thinking of doing an AAT. I think a bigger school is the way forward. The thing I'm getting out of is being the one who does the first aid, and getting more involved in what I would class as a senior management role. CSBM has definitely changed my view, and now that my children are getting older I can concentrate more on my career again.

The phone system is about to die. For the new phone system I basically got the quotation, the analysis of the quotation and talked this through with the headteacher and checked with other members of staff [about] what we want from the telephone system, talked to people actually in the [CSBM] group as well to see if they'd heard of the company. It's going to be in by 30 September.

I've heard some heads didn't like the idea [of having an SBM]; because headteachers are teacher training they should be concentrating on that, but unfortunately I don't think all heads are able to let go. It's only because they've been there too long and they can't let go so actually they need to feel as if they're doing it all.

BDP case study 17 (CSBM)

We're 333 on roll, that includes quite a socially deprived area so free school meals and special education needs. A nearby special school is closing next week and we're getting some of their pupils, generally autistic.

We have 16 teaching staff. We've actually got small classes as well at the moment, between 24, 25 in each class. We have about 19 support staff.

There are three schools very close to each other, one next door and there's another one just down the road. Ours was built in 1951.

With money the way money is, I have looked at whether we could get funding to do this conversion. We're quite a poor area business-wise; it would be difficult financially to get finance from, because there's not a lot of business around here at the moment.

I started off in Barclays Bank just as a junior and worked up to cashier, was there two years, then I went to a district council where I went to the housing department just as a general clerk and worked up to repairs clerk. Then I went to the rates office and I was a rates accountancy assistant. I came here for six weeks in November 1989 to replace somebody who had gone off sick and I've ended up staying.

I've just gone full time but I do long days so I do still have the holidays off ... I still come in from the holidays but I don't have to come in. I can have a good break in the time.

I saw CSBM on the internet but I didn't say anything to [our headteacher] and then she came in [and asked] had I thought about that? She thought that would be good for me to do and because I'd thought about it anyway I thought I would apply and the chairman of the governors was for it as well so I put in for it.

When I started it was admin work. I wasn't involved with curriculum or anything like that at all. Then I used to do the budget. When the present head took over she knew nothing about the budget at all so we worked quickly together.

I did start going into governors' meetings before doing CSBM, and it just talking about the budgets and going through the budget plan and monitoring.

Not being a very confident person I found it quite difficult to stand up in front of people to make a presentation, but I found the course very helpful in this respect. I started going through the first module, checking everything there which we haven't got in school. There was no incident plan so that was one of the first things; we'd got emergency procedures if there was a coach crash, but that was it. I helped with the health and safety policy and then I got asked on the senior management team. Then I've also been asked on the ICT coordinator's team ... because that's the aim of the school at the moment – to embed ICT into the curriculum.

I wrote the building and development plan for the school, a building agreement development plan, medium term and long term. The refurbishment of the toilets became my case study, actually, and converting the swimming pool area into an assembly and dining room is what I'm investigating at the moment. The governors have decided to close the swimming pool down. It's the most expensive provision that we've got: it's only for six weeks of the year. A nearby special school has got their own swimming pool, a heated pool, and to provide swimming in that is cheaper than having our own pool. There are very strict health and safety regulations in that area, child protection issues; it makes more sense to close ours and use theirs, which is available all year round.

I've tried to help the teachers out a lot and this year to facilitate ... communications systems across the school, including electronic systems for staff collection and distribution of reports. Basically we do our reports on computers ... so what they do they hand me on disk and then I check them and print them off and collate them.

I'm overseeing school trips ... because of the particular incident policy to make sure things are followed correctly.

I'm going to play a big part in ICT towards developing the website. That's going to be quite a big job, keeping that up to date. I'll be training staff to do the finance module and I can even see us getting a perhaps a receptionist or somebody. We're taking more on in the office, which is increasing our workload quite a lot.

BDP case study 18 (CSBM Primary)

When I was first appointed I took over from a lady who had been here for 22 years ... I naively believed I was coming to do a secretarial job and I soon realised that there was a lot more to it than I'd anticipated. Nobody told me it was a £750,000 budget and I was going to have to reconcile everything and ... I wouldn't have taken the job ... if I'd known how large the financial side was. The head has been hugely supportive because she knew I didn't have that financial background and school finance is very complicated. My role has changed in two and a half years because I introduced lots of new systems and I suppose the biggest impact was the change in the database we used both for pupils and for finance.

I worked part-time for a housing association as a ... housing officer for the elderly. Before that I was a full-time housing officer for 10 years, in a huge city. Immediately before I came here I worked for a nursing and homecare agency; I was part time and I was their administrator, and I've been with them for four years and my duties there included setting up training programmes, training manuals, appraisals, all the data for staffing and clients. Whilst I was with them we got our Investors in People award, and last week this school got their Investors in People award; so you get me and you get an award.

This is a community-based school where we have lessons in the evenings for various groups. It's an area I think we will be developing in future. The school roll is about 270.

CSBM has given me huge motivation and the vision that my role could develop. I think it will change significantly in September and onward when we get a new head. I hope that's going to change. Until I was involved in CSBM nobody had really referred to me as senior management. The head and the deputy head now do but within the rest of the school I don't think anybody's got a clue. If my role is going to change then I do want to be more involved because I now feel I've got the abilities and the knowledge ... because of everything that I've learnt. I'm hoping I will be able to go forward with [it], because a new head who's recently qualified is going to have all the enthusiasm.

I'm excited about the knowledge the course has given me. I've enjoyed the residential sessions, very helpful ... by the early part of the term you are really struggling so maybe the residential part ... does give you a chance to relax for the first time with your colleagues. The course workload has been an issue which I think needs looking at. My head has been very supportive and has allowed me half a day a week to go home and work on my course.

When I joined the school and went to order my badge, what did I want to be called? My job description at the time said senior administrative assistant. I said what's the point of putting assistant when I haven't got anybody above me. I can't understand that; there wasn't a senior administrator. They didn't think bursar was an appropriate title; it didn't mean much to the parents. So I suggested office manager because that's what I was doing and so that's how it stuck.

I'm saying to the new head we have got to move on and put me into a strategic role. We have got to recognise the fact that it's going to cost money, and you have got to put your money into the budget for admin because the admin team support the whole of the school. If that office downstairs isn't running well or starts falling down then everything else starts to go wrong, so that's a major issue. My contract is [for] only 40 weeks of the year and I only do 32 hours a week, and it's an issue that we're going to address with the new head because I did some benchmarking. I've got a personal assistant who does 20 hours a week, and we struggle. I have been saying this and not getting anywhere. So I did the benchmarking and out of schools of comparable size we were right down at the very bottom ... this is 2002–03, we only spent 2.7 per cent of our staffing budget on admin.

I hope ... it really will develop into more of a school business manager's role, but to do that ... I will need somebody to do part of my work. Last year I successfully managed to get my assistant's hours increased to 20 hours a week.

We've got a problem with trying to get parents to pay their money on a Monday for the whole week. You're wasting an awful lot of clerical time counting money every single day so it's something I've just got to try and deal with. It is a problem because of the type of catchment area where we are, a lot of people [are] on benefits. But we've got a lot of people who still send it in, £1.50 every day, and you just want to scream.

I'm running a list of things that I want to deal with next, like improved policies. For example, the disabilities one: we don't ... have a formalised emergency pack. I've got lots of ideas for when the course is over. My intention, if the new head allows it, is [to] continue to have half a day a week for work on development of the system and policies. I'm really excited about being able to take it forward and I need to do it quickly while I've still got that knowledge.

... I want to see things tightened up; people are doing day-to-day procedures. I want to tighten up on lateness. We addressed the attendance issues in that we had installed last year the SIMS attendance module which not many primary schools do. I've really been at the fore at getting that in, running it, maintaining it and it's made a big impact in attendance and we're monitoring everything much more carefully.

For my case study I'm doing induction. It started with induction for a student because we have a lot of workplace students there from colleges and high schools and ... the research soon showed me that ... we need to do better induction procedures for teachers, teaching assistants who are in fact really willing to work in schools, and parent helpers. So what started off as a fairly small project has grown and I'm going up, I'm working on it at my report stage and then my intention is, come September, that I will actually carry out those inductions and monitor the feedback and all that kind of thing. I'd also like to do something about marketing the school because of our falling roll, and I think we can do something to get out there and get people to put their names down for nurseries earlier – not quite sure how yet but it's something I'd like to do.

I feel very much more confident and I think one of my greatest achievements through doing [the course] was presenting the budget report to the governors' meeting ... a year ago or 18 months ago I would have been terrified to do that. I did it and I also did a presentation at another governors' meeting to tell them about CSBM ... we'd been encouraged to do that by our tutor because governors need to know that things are changing in school.

I planned the installation and did all the research for having a new phone system for the school. I managed the whole thing and gave a report to the governing body asking for funding for it. I would have found that really difficult before doing the course, so probably the phone system was the biggest thing that I've undertaken on my own, as a starter.

BDP case study 19 (CSBM Primary)

[This SBM works in a middle school with 551 pupils between the ages of 9 and 13, covering two key stages. The school has in excess of 30 teaching staff and there are 4 administrative staff. The SBM is called 'bursar' in the school. The school has eight teaching assistants, two of whom are higher level. At the moment they are taking on two more. There will be two full-time cover supervisors. School meals are provided by the county caterers but the midday supervisors are the school's side.]

[The SBM has been here six, nearly seven years, having worked in another primary school for eight years. At the moment her main areas of responsibility are to look after all the premises staff, do all the finance, all the purchasing, all the invoices.]

I don't do a lot of the budget but I do the calculations. I don't actually sit down and do the budget myself. The senior management tell you what they would like and you then tell them that they can't afford it. I also do a lot of the day-to-day things, which has included the lockers, cleaning up sick, and I've done the boys' urinals. Much of this is because they've reduced the caretaker's hours. This has given us problems. We're not covered during the day, sometimes he's very good and he will come over. At the moment he is in a non-cooperation stage, so he doesn't come over. So, I have to put the rubber gloves on and go in the loo.

The present head has been here 15 years and the new head is coming. This will be her first headship, but she's young and has done NPQH and all that.

Before doing CSBM, I hadn't actually done any learning, other than ... CLAIT and word processing in the 1980s when I was coming back after my children.

For things like CLAIT, you're learning things and you learn and then take an exam in that, and you pass it. I found it unbelievably hard with CSBM to have somebody telling us, "I'm here to facilitate your learning. I can't tell you whether you're in the right lines or not," and I found that the biggest screw-up of the whole thing.

I think most people who are bursars are numerate, rather than literate: either do your English or you are a numbers person, but I found dealing with the grey areas very hard ... the stuff (course materials) is brilliant and it's very well presented ... it will be a good reference. I've been helped a lot with the health and safety, the one I would say that's been the most helpful at the moment.

I think if I hadn't had a support network, it would have been very, very difficult. There were three of us. We all would have sunk without each other ... but sadly none of them are going to the graduation.

I will say doing the case study ... was absolutely brilliant and in the end, I think that was my most enjoyable thing of the whole course. I did my case study on legionella, because we had a problem here with it. It was the county system that I was rebelling against, that the rules and regulations have certain things and you're supposed to have water, hot shouldn't be below 50 [degrees], cold shouldn't be above 20 [degrees]. They turned up here in 2001 and had a meeting with a caretaker, and gave him a thermometer and said, "You test this every month" ... it's such an old building, it takes so long to pump the water round at a lot of the outlets, the water is not hot enough and also the cold water gets too hot because it's stuck in pipes on the way round, so it's not right.

I really enjoyed that and the actual presentation I enjoyed doing it and it was so nice because you were with 12 of your friends that you've gone through with.

The other thing I gained was the confidence when I'm dealing with people from outside whereas before I used to be a bit sort of timid. Now, I just say what I want. I would say that's the greatest thing that's given me the confidence ... I'm confident with my competence in what I do in here, and I have also become more confident now with teachers.

My biggest thing I want to do is to be involved. Although I'm in charge of the buildings, state of their repair and maintenance and that sort of thing, I'm quite lucky that I have a husband who's a builder so I can turn to him for advice in certain situations. I think my biggest frustration since I've been here is that whenever any plans are made or drawn up for anything, I'm not included and, when the works are done during the holidays, I have to come and cover it. If the caretaker is off I have to come and do the locking and unlocking. But the frustration I find is that I never know what is said at the original meeting. Our school's in a very inefficient local authority area. The building surveyor supposedly liaises between the big contracts, he takes them on but ... he doesn't take any notes at all at the meetings. So, you don't know what he's been asked, I don't know what he's been told and then I get stuck in the summer because he'll be away on call for four weeks.

BDP case study 20: headteacher comments (Primary)

There are very considerable benefits in confederating two small schools. For the first time in a small school I've got the luxury of having a senior management team. There are four on the senior management team now to discuss issues and the way forward ... very important.

I have a teaching assistant team as well ... A teaching assistant is not there for an individual teacher, they're there supporting the children ... they're a good professional team, they're really committed, but ... I've found that the business manager can actually talk to them on that level and they can actually say things perhaps to her that they wouldn't to me. But we get to their things in time, we can actually deal with things, deal with any issue on a ground floor.

The benefit the business manager has brought by doing the courses is tremendous. I soon realised that the agendas that the business manager was speaking to me about were agendas that an admin officer had not been talking to me about. Now here I was with somebody on my staff who was more up to date on issues than the rest of my staff. I gradually began to realise that I needn't worry about a lot of things and that she could come and discuss things with me. There were also other things in the basket that I could give over, and guess what: that made more room for education.

I couldn't have done the workload unless I knew I had someone like my business manager here. I'm positive, absolutely, positive about the course and having a school business manager.

Now with a confederation and a shared business manager you can have a teacher for Years 3 and 4; 5 and 6 – that has definitely, definitely made a difference to the educational standards the children achieved.

The fact that we can hold joint booster sessions, the fact ... that we can go on educational visits to support our pupils jointly, and share the costs so that we can have more visits out: wonderful impact really. But this is by inviting people to come into the school to support the curriculum at half the cost. We are certainly sending very positive messages to our authority about ways forward for schools but I think one of the recommendations I shall certainly be making is that when you do confederate you do it with a business manager's role.

BDP case study 21: headteacher comments (secondary)

[Julie (note that names have been changed)] is the most untypical business manager that I've ever come across. This is because Julie is the human dynamo that she is.

When she arrived, which I think was a year last June, she took over an empty state, a seat which has been left vacant for a very long time because the previous business manager had fallen ill and has had a prolonged period of absence during which she was doing part of her work from home ... it wasn't until she had finally been given early retirement on health grounds that we were able to advertise for a successor. So, ... when Julie came, she had a huge mountain to climb in what was a short time and Julie being Julie, she set herself a deadline that by 1 September when the first school year for which she was going to be responsible came, she was going to have sorted things out in her head, she was going to have cracked all the systems and have made herself thoroughly familiar with everything.

This is a very high-powered institution and I say that in terms of the fact that standards are achieved. It is about standards as far as the students are concerned; standards as far as relationships are concerned, and the processes that she is refining now have required a lot of her time.

She is a fully fledged and fully paid-up member of our senior management team. I think business managers do have much more to prove than people who'd gone up [to SMT] by a more conventional route.

Other members of the SMT feel absolutely fine with her being there. Her skills, her knowledge are phenomenal and the fact that they are not measured in terms of how to manage 30 children in a class does not diminish them in any way in anybody's eyes.

She is the oracle as far as everybody is concerned. One of the greatest skills and one of the things that I admire most is that she knows the answer or else she knows where to look for it. She knows her way around the internet amazingly. She knows her way around Shire Hall [home of the local county council], she is prepared to make decisions herself; and will chase up people at Shire Hall and put the fear of God into them. She has a fund of information which I personally find invaluable.

I've involved her in something which previously was not the role of the business manager. Performance management has always been an SMT responsibility in school. It was the job of one of my deputies, the deputy who's off ill. Not to put too fine a point on it, the job was never very well done and, you know, behind every cloud there is a kind of a silver lining – and the absence of that deputy through illness meant that I had to hand it on to somebody else. Now, as a way of ensuring that it was going to be done very seriously and put onto a firm footing, I decided I was going to share the role out, and the whole-school performance management is now shared between the assistant head, who's doing it on behalf of the absent deputy, and Julie. So, Julie is now sharing a whole-school role. I sent her and the assistant head ... on a very costly but very, very high-quality course and the two of them have in fact put together a

blueprint for the future whole-school development of performance management and quality assurance. The quality assurance bit will be quality assurance in the classroom. That is a whole-school role which is not ... strictly speaking separate from the role of the business manager. This is a proper SMT role and I see that as a quite significant departure for her.

As far as admin is concerned, I would actually say that Julie increasingly leads. She has created team leaders and the team leaders increasingly take on the role of managing their own areas, for their own number of colleagues. They refer to Julie; they use her as a listening post and she will say, "Yes, OK" or "No, that won't work," but then they would go and do it themselves. So, she is increasingly the one who is there for their support. But she has led by example and she has created. She's changing the culture. She's actually empowering people. She's empowering people to lead in their own areas, at the moment they are managing.

She has accepted that the challenges she's imposed upon herself were major ones. She's gathered all her team leaders together, you know, the staff managers, the office managers, the senior lab technicians, the senior IT technicians. She gathered them together with a view to training them to lead within their own areas.

When she first came, she had huge amounts to do and she saw her first priority as being to raise the profile and the status of all support staff, who have always been valued in the school because that's the way we are, we are that kind of community ... Nevertheless, they had no say to us, they had loads of chocolates and biscuits at Christmas and buffets and other things but in terms of their career structure, there was none. She had a major job to persuade people that there was a career structure even though financially there was not a huge amount to play for. There were all kinds of other advantages that they could look towards. She has created a structure which has transformed the perceptions of all the non-teaching staff about their value and the esteem in which the rest of us hold their help. That must be beyond my wildest dreams really, you know.

Julie has an interest in anything that we do. The only thing she doesn't do in school is teach, but she's involved with pupils. She is heavily involved with Young Enterprise. She has taken or accompanied school parties on trips.

One of the things that Julie is going to be doing is in our next staff meeting. She is going to be talking to the whole staff about school finance, whether they like it or not. They are going to understand. I agreed for her [to come] in to address the head of faculty meeting on this last year.

She's struck governors as well; which is another problem because the chair of governors wanted her to be her personal assistant. So I told the chair she is not that, but if you want a personal assistant, just let me know and I'll find you one.

But her job is much more strategic. She's there [at the governors' meeting] as a consultant, as an adviser or an estimator. So, I try and put her over as a consultant, as an expert, as an adviser if you like but not as a 'gofer'.

... We were re-awarded Investors in People last summer and it was made perfectly plain that had it not been for Julie's intervention, then we wouldn't have been re-awarded it. She made the difference; she made huge difference with the school's management. So they are all now performance managed in a meaningful way.

In terms of Every Child Matters, our school ... is expecting a phone call within the next few weeks. I have to say, we ticked all the boxes and Julie knows exactly what the boxes are, in terms of being safe that is, and she sees that as much her responsibility as anybody; a safe environment, healthy living, healthy eating is very much something with which she has involved herself. So, modified menus are cooked in the canteen; ensuring that we have water around the school; ensuring that we don't have fizzy drinks and hyperactive children. She has achieved all of that, and that's something we all share. This is our collective responsibility, economic well-being, she is one of the most influential people in Young Enterprise. So, she has her finger in everything, I promise you.

As a professional, there is no lack of loyalty, of commitment, of total focus. She's wholly focused on the job. As a human being and as a colleague, she picks me up when I'm struggling, in a way that I couldn't actually ask anybody to do but, you know, as a human being she does that. She understands me as well as anybody understands me. She hasn't known me for as long as most of my colleagues, yet she understands me better than most of them.

She is very, very good at achieving the desired result ... you have to have the people's skills, you have to be able to meet people on their terms. But, she has the killer instinct that you have to have to get where you need to be.

I can just go and give Julie a scenario and she gives me the answer. Maybe she'll say, "Well, I'll just check this first," but she gives me the answer. At that breadth, I couldn't put a value on it. I could not quantify that.

Human relations, personnel, I need somebody to talk things through. Julie understands everything where I'm coming from. Without that, I will be lost, in terms of contract, finance and everything to do with premises. It's not only the day-to-day stuff. Anybody could have assimilated the day-to-day stuff. It's the way she can look from a dispassionate distance at what is going on. You get that from having this huge amount of resources that [NCSL] has given her. I suspect that the way she is now is due to whatever she has experienced that has inspired her and [NCSL] was a major inspiration for her.

It is a source of huge embarrassment to me that I have so far failed to ensure that Julie is [properly] remunerated, that her salary is in line with the kind of job that she does. I wish I could find some way of correcting what is a serious devaluing of the job that she does. I have written three times now to HR at Shire Hall with no outcome. So, I wrote to the director of education, expressing my serious anxiety that by not paying salary commensurate with Julie's ability, I'm going to lose her. It's embarrassing, you know, I look her in the eye and, around this table, she's paid £10,000 or more less than other colleagues and she does easily as challenging and responsible a job as they do.

BDP case study 22 (CSBM)

I am a business manager and my four main areas of responsibility are finance, premises, health and safety and systems manager for the administration computer network.

Prior to coming here, in my previous school I was primarily finance but with a bit of systems but not systems manager. There was another teacher who was systems manager but if he was away teaching or out on a geography field trip I knew the system so did day-to-day things.

This job is a promotion. I am on the senior management team, I was at both schools. I took over from deputy head who retired after a long period of absence. Here they made that conscious decision not to reappoint a deputy but to appoint a business manager. I came in on that level which helped, whereas at my previous school I built the role up and I got as far as I could go without people leaving.

We've just been granted specialist college status for science and sport; we got the confirmation letter last week. All of my areas since I started have developed almost into individual jobs in themselves, and I try to keep all these plates spinning. I have actually got my review with the head tomorrow. As I am beginning to realise, you go through a stage, "Of course I can cope, I should be coping," and then it actually becomes a weakness in itself when you try to cope with it all, and I think that before I reach that point of meltdown I am going to raise the flag up, because each individual area has developed in itself so much, that I am really going to need more assistance and have someone to do things for me. I am going to have to start delegating. It doesn't matter what salary I am being paid, I only have so many hours in the week.

Before I came, the finance assistant who has been here years was struggling. She couldn't keep things going. She could do the orders and the invoices and that was about it. I came in and I thought that we'll get the auditors in, draw a line and start again. At that time, the head was trying to help as well. Now I didn't see that, but people have said to me it's made a difference in the head, but they can see the pressure has been taken off him. I think that is great, that's exactly what I should be doing, but now the pressure has moved onto me.

We've just [became a] cheque-book [school] in April ... I have all these bright ideas, some of the problems are self-inflicted. But once we've got through these teething problems it's going to be fantastic going cheque book. I can already see the benefits. We've had a lot of building work recently. It took 12 months to refurbish the toilets because there was such a delay in the start we couldn't rip out the toilets and put them in. We had to do them on staged programme. Most of last year, I have been working in toilets with architects and builders. What I don't know about toilets. And then we got the flat being refurbished and we've had windows put in and now we are a specialist college and we'll be having a major build with that. I wasn't heavily involved in this bid, by choice really, because I thought my time will come when we get it and it's got to be done. We are going to appoint the head of science, who was so much involved in writing the bid; she is going to be appointed as the person who manages the specialist college. So from September I will be working very closely with her and sorting out the finance side of things. It is just a matter of time. I have only so many hours in a week to do it, I am not being a martyr, but the buck has got to stop with somebody. You don't have the luxury to say, "Oh sod it, I am going on my holiday for six weeks now."

I'd seen CSBM come up and ... it is one of those things that I thought would give me a qualification, that is a recognised qualification, and ... it will look good on the CV. But also it confirms that we are carrying out certain roles. I haven't got an accounting qualification, and it was really important to have some sort of formal recognition of the scope and the work that I do really.

Once on the course, I think that each and every one of us came away from that session [on education enterprise] thinking that "I have not got a clue what are they talking about." I suppose heads and deputies are more into the educational babble really, the buzz words, jargon and what not. Once you get into it and you know what they are talking about, it makes sense.

Tasks on the course seem to cover a wide range, looking at the finance for example. On the one hand you are asked to track and order, from it being placed to being paid, and that's so basic, and then you turn over and the next thing you think ... "What do you mean? How do you expect me to do this?" The breadth: some are so basic and some I would say are degree level.

The course does boost your self-confidence and your self-esteem. It gives you a lot of good pointers that if you don't know, at least you now know where to go and look for information. But the thing that I find more than anything else the most useful is building up the contacts ... I find it quite an isolating, isolated role in the school ... being on SMT, but as a non-teacher, I am neither fish nor fowl. On SMT we are all equal; it is just that sometimes some are more equal than others.

There is isolation in this job ... set apart from everybody and not belonging to any one group. That's what makes you feel isolated, and you're tearing your hair out and you're thinking ... "It must be me." You get on the website or get emails from people and you go, "Oh, it's not just me, they are going through exactly the same problems and having to deal with the same issues." And it's that sharing, coming away from the sessions and you've all had a good chat and you think, "I am not on my own doing this."

I actually quite enjoyed doing the case study. I decided to do 'going cheque book' as we are going cheque book in April and it did cover all the other areas, because in the process of doing it we looked at facilities. Is this the time to take on catering in-house, because a lot of schools when they go cheque book do that as well. We have looked at it and decided against because we are making a healthy enough profit through the catering ... without the hassle. There is the human resources side, do we need extra staff, because there is the extra level of differentiation of duties and the staff training side. There is the administration side, getting people to do things.

I think from the self-confidence side, particularly the health and safety, it is in me, more knowledge, it has frightened me to death as it is massive. The head who is retiring ... has been in the school for 21 years and I can see exactly where he is coming from: "Oh for goodness sake, whatever happened to common sense?" So – how can I put this tactfully – he hasn't exactly embraced it perhaps as much as we ought to have done. And again, because I didn't have a transition period with the previous person who had been off, it was, "There is your desk, Sheila, there is your computer, get on with it." The course has helped me a lot with the health and safety but I know I have still got a long way to go with it. But on the health and safety side, the risk module has helped me the most.

I'm a bit uncertain about the new head. She has already mentioned the deputy doing finance. Fine as long as if he does it, he does it. I am a bit sceptical about strategic management. Strategic management is to me that he will get paid but I end up doing the work. I feel that finance is my baby in a way, as I got it set up, and the auditors are always happy. I would be quite happy if she wants to take anything from me, to take the health and safety.

I would recommend CSBM to anybody; if someone was asking me about going on the course I would say "Yes, go for it, but be prepared for not understanding the jargon to start with." I would definitely recommend people to do it but ... don't allow yourself to fall too far behind, but that's easier said than done.

BDP case study 23 (CSBM)

The school is a Catholic high school with about 520 children on roll, which is rising, and there are some good premises for the future. There are 38 teachers at the moment but will be over 40 in September when there will be 3 new posts, and there are about 24–25 support staff as well.

Since I was 16 I worked for Lancashire County Council, supposedly starting on [Young Persons Services] (YPS), which never happened, so I started in finance, paying invoices, and worked my way up in finance, so eventually I was a finance officer, visited schools, helped them on the budgets, budget monitoring, and advice on anything financial.

I really enjoyed the CSBM. It's covered all the variety of modules and all of relevance to the job, which is good. The case study has been really useful for me because it is something that I implemented in the school, it's up and running now, that is support staff appraisal. A lot of schools have asked me for that information, so it's been shared with a lot of people ... And all the modules have highlighted things that I wasn't aware of really, and things that should be in school that aren't in school, and policies that should be in that aren't, that kind of thing, along with those things that need revising but haven't been for years.

It's useful to meet people as well. I do meet a few of the local bursars, but meeting people from all over the north west in our cohort ... was interesting and we all keep in touch.

At the minute, part of my role is the head's PA, and I find that takes up a lot of my time really. We are looking for employing someone for 20 hours a week to do that. I would lose that from my job but I would take on property, which I don't do at the moment ... I will find the facilities module useful. People refer to me as a school bursar but I am in fact school manager, which includes the responsibility of being a bursar. The head says that he finds that the day-to-day responsibilities involved in being his PA [are] hampering me from doing the more strategic roles which [are] part of the job he wants me to concentrate on. In the future the head wants to put sponsorship and attracting funding as part of my job description, so that's something that I will be starting to do next year.

I just manage the admin and the cleaning side of it. We have just taken on the cleaners under the school's remit; we used to buy out for those, but we take them on. I have always line-managed [the] admin team but I don't line-manage classroom support staff, they are done by the [special educational needs assistant] (SENCO) and by the senior classroom support assistant. We also have departmental support assistance ... in maths, English, RE, [special educational needs] (SEN) and science, but they are line-managed by their head of department.

I was always on the SMT. I tended to sit on it and it wasn't written down anywhere that I was on the SMT, but the previous head did indicate that he wanted me on the SMT, so we finalised that by changing the job description slightly to say that I was on the SMT.

Leading up to the assessment has been fine. We've done three sessions, it's quite a long time between the last session and the assessment, it was in April I think, and I am being assessed in September and I have been emailing my tutor quite a bit, so the assessment has been fine. My case study is on support staff appraisal so it will be useful. I've enjoyed doing the case study.

The course was great, and very useful too, as you end up with a file full of all these different modules. So the notes from this course, I have them on my bookcase in there, have every website you can imagine and every bit of help you could possibly want, that's really good. It's almost like having a big reference library for the whole job at the end of the course, so that will be useful.

The risk module: ... that was the area that I felt that I didn't really know much on at all and at the beginning of every module you have to assess yourself on what you think you know. I ... found that when I started reading through it I actually knew more than I thought I did. And

when I assessed myself afterwards I was more on the 4. It's been like that on every module really.

There wasn't much on marketing. I think that would be useful, a lot of schools are going that way now, producing more marketing. I am getting more involved in the school prospectus; I have not got direct responsibility yet but it would be useful, helping understand how to market the school in a positive way.

We did spend a lot of time reflecting, but it does serve a purpose as it shows how you have improved afterwards and that what I didn't think I knew, I knew all the time. And you moved up each time. Things like the risk module again, we have got the policies in school but they are a bit out of date. We didn't have things like a critical incident policy and I have asked the head if I can go ahead and start changing some of those. We will probably be using the models of the fictional school that they used.

I learned about the course because the diocese wrote to all the heads saying that NCSL had [given] them the details of the course. This came through the diocese, not county council – I don't think the county council know much about it.

I liked the online aspects of the CSBM. I found that great as you can work at your own pace, your own speed, at evenings and at weekends, when I can't sleep. I can't say I have disliked any of it at all. The residential side of it was great, just to get you out of school for two days really. The facilities were really good there. The residential [sessions] were useful for coming together and working as a group and coming up with something. On the last one, it was good, we had to do a presentation and we were all terrified and thinking we don't want to do this but we had to. We all had to stand up [and] do a group presentation. At the end our tutor said how brilliant we were but we thought it was a load of rubbish. It made us realise that we are better than we think we are on some things. It was a very nice atmosphere; we had a very good group.

BDP case study 24 (CSBM)

This is a three-form entry junior school in 11 classes with 305 pupils on roll. The school is a 1960s flat-roof building, with large grounds, outdoor pool and playing areas. The buildings are in considerable need of updating – windows, floorings. It has recently been re-roofed. A tour of the premises with the bursar enabled me to see the range of development needs of the school. It shares the site with a separate infant school but each has its own head, governors and bursar.

The bursar has been in post at this school for four years, prior to which she worked in another primary school with SEN pupils (though she is not a teacher). There she also provided support for governors and SEN, office support after school. This was a school, she said, where parents were strictly not let in. Prior to that she had been a school secretary.

The bursar was situated in what would have been the school secretary's office spot, "guarding the front entrance". The head's office was next door and there was every possibility that the two would and could work closely together. The bursar also dealt with pupil emergencies, answered the phone, dealt with sickly children and showed in parents to meet the head. Her present title is school-based office manager and bursar. This new job title was created a year ago to accompany a new job specification and also a pay rise.

She commented that she had been looking for professional development and saw the [CSBM] course, quite by chance on the NCSL website. The head is supportive of her attending the course as is the chair of governors, since both saw the course as an opportunity for her.

Her aspirations about the course have definitely been fulfilled. "It is a very good course, in terms of the information made available and the provision of resources to do the course. These are excellent." Doing the course has reinforced her understanding of the need for the job she's doing. The old perception that "all you do is answer the phone and stick on a plaster" is well dispelled through the course.

She has found the course to be thought-provoking. It was proving particularly helpful in that she was now able to pinpoint and prioritise needs and to create a number of discrete projects which would see the necessary tasks accomplished. "The course has enhanced my skills. I'm more confident in dealing with challenges which come my way and I can be more forceful in why ... I'm doing something. I now know many more of the right questions to ask, especially on ICT."

A key benefit from the course has been networking. "I was part of a small bursar network before but this has definitely extended all of that for me. Meetings for bursars in this area were not as OK as for heads, deputies or even SENCOs, so meetings out of school time, after school, were often not well attended for personal reasons." "The course opened a new chapter for local bursars, especially in ways of *sharing* good practice and avoiding bad practice."

Her current role has not changed yet, but in personal terms she felt she had definitely moved on. The scope of her remit hasn't changed, neither has the responsibility. The bursar is not a member of the SMT, but attends by invitation on relevant matters (this is the state on paper but not in reality).

There is no performance management and no appraisal for the support staff as yet. The head is also looking for an information input clerk to deal with attendance and attainment data, which will ease some of the administrative burden on the bursar.

The best elements of the CSBM were the networking and the camaraderie developed from the residential sessions. These have remained through email and by phone. The tutors for the course have been "excellent, their delivery is fantastic, information is clear and concise, challenging and motivational. The folders are a good resource, the information is very good. They are not easy to work from at sessions but then they weren't designed for this."

“We have laptops for teachers, why not also laptops for bursars?”

She felt there was too much limitation on tutor’s time; she felt tutors needed more time allowed them for their duties, particularly in keeping up with the large amounts of email that bursars send them.

In the local authority, the finance team appreciate that some bursars are doing the course and appreciate what they know as a result. The bursar felt that her status had been raised outside the school by her doing the course. She was hoping that the same would happen within the school. The head is due to retire in a term’s time.

Practical outcomes for the bursar included the development of a disaster recovery plan and the refurbishment of the toilet area. The course was particularly helpful in dealing with tenders and project budgets, and has “given me a clear idea of who should be doing what. I got the site manager involved early on which was really useful.”

Her aspirations for the future included getting an afternoon clerical assistant who would be able to deal with the “remodelling 24 tasks” and to complete an AAT or preferably a DSBM course.

BDP case study 25 (CSBM)

I am the finance officer for a large foundation school which is a selective school in the south east of England. The buildings are traditional, there are large grounds (some of which are being sold off to raise money for new classrooms) and the pupil roll is over 1,000. There are 5 full time equivalents at age 11 with 150 per year. There is a teaching complement of 50 full-time equivalent (FTE) teaching staff, 9 support staff, 4 learning support assistants (LSAs), 6 technicians, 9 catering staff and 4 site staff.

I think that some further restructuring in the school will take place when certain senior staff retire, as they will soon. When this happens, some tasks like timetabling and cover will come to admin. Remodelling is a bit of a joke in money terms. We’ve been given £8,000 for this year. Yet we’ve taken on a reprographics person; a part-time person as secretary to the examinations officer; a part-time person to help head of [sixth form] with UCAS; and we’ve designated a person to do attendance.

We are part of a consortium, sixth form, for courses which are not available elsewhere. Sixth-form funding is from the [Learning and Skills Council] (LSC) and is a best-guess operation. The catering [and] vending involves over £1,000 per day, the annual budget is £3.5 million and then all the stuff to do with specialist status is extra. With a large sixth form the arrival of the [Education Maintenance Allowance] (EMA) for Year 12 next year, will be more work.

My previous career was with a large public utility company, until a restructuring exercise meant that a redundancy package was attractive. Having been a governor in a local primary school for some time, I felt I knew more about schools than I would have done simply from being in the large utility company, and when I saw this job in the local paper, I applied and got it.

The course came at the right time. The head came down here one morning and said, 'Have you seen this course? Why don't you put in for it?' I applied for cohort 1 but got in on cohort 2.

I felt a sort of fear and trepidation meeting other people, not knowing anyone. There was a sort of existing local network but there weren't many meetings, with problems and pressures, but the course has provided new contacts.

The course materials seemed daunting at first but reading the materials and listening to the tutors I found lots of it very useful. The course has meant that I've had to glean a lot of information from around the school. The questions are well structured and thought out. The diagnostics are variable: Everyone's on a learning curve except on finance. I'd been used to multi-million budgets at the utility. The booklets were first class, but Don't use yellow type, it's illegible. There were some problems with some websites we were advised to consult, as further passwords were needed which we didn't have. The material is clear, logical, the glossary of terms and reading provided kept up to date.

The first session was intensive, lots of chalk and talk; the second was more relaxed and [with] more input from candidates; the role play exercise was very helpful. The tutoring was good in that they organised the material well. Advice from tutors about date-stamping material consulted is good, especially if you revisit the stuff later. The gaps between the sessions were fine; they were close enough to keep you focused but not so far apart that you lost touch. Face-to-face tutorials were open and helpful. On the question of timing, they need to realise that late March would be a no-no, but other times, two days for a session is not a problem. The assessment guidance was clear and succinct for the production of the LDP in terms of the order of materials.

The course has shown how the bits we're doing here all fit in – eg the two-storey block and getting hands-on involvement. It's opening up new vistas and possibilities. The course has helped me, but the role was defined before the course. I report to the head, to the governors, I'm on the finance committee of the governors, I produce budgets, projections for five years, monthly reports, orders, invoices, bank and [payment by] BACS. I attend the SMT meeting monthly to report on the accounts. A longer-term aim is to get on the SMT.

As evidence of practical outcomes from the course, or insights which it's given, the facilities project – we've created a new reprographics room out of an old book store, I've done the costings, updates, new office, leasing the machinery and staffing. I've dealt with a new cleaning contract which has gone out to tender [at] £50,000 p.a., doing the specification within best value, and for all of this the first modules on facilities were very helpful.

BDP case study 26 (DSBM)

[The SBM at this school came to the educational world from a previous career in the private sector.]

There are 1,271 pupils in the school. It's a rising pupil roll unlike most of our competitors, who are suffering falling pupil rolls. So, we're obviously doing something right and we're able to thrive. We are a school which does a lot of collaborative work with local schools. In this area ... there are lots of houses. The population is quite high in this area.

We've got a boy's Catholic school next door to us which is slightly larger than us ... we have another girl's school ... across the road which is 1,300 girls. We have an independent school just up this road which has got 700 mixed and we have, two miles away, another very large comprehensive school. Most of the schools have got a good reputation. We have got very pleasant grounds, it's got good facilities but the buildings are quite old so we are into [Building Schools for the Future] (BSF), and next year we're hoping to be one of the first schools for that, so, whilst it won't be a completely new building, it will be refurbishment for us.

We have 90 teaching staff and the rest (about another 55) are support staff. We have a lovely situation. I have been here since 1 September 2004, which was the day after I finished the DSBM.

I found it very, very strange to begin with ... not having ever worked in this kind of environment before, never worked in the public sector before, never worked with so many women before and lots and lots and lots of different things, and it was very strange. I didn't understand the language, didn't know what they were talking about. The acronyms that were being used as part and parcel of the everyday life [were] going way past me and of course my own acronyms were going way past them as well.

The main benefit for me was the fact that the people here are very warming, they are very inviting. They've practised inclusion and it's something which the commercial world doesn't tend to do nowadays because inclusion is very much ... a primary school type activity, possibly also in secondary school. So, it's a very pleasant place to be and I think that has made a big difference.

But nevertheless a lot of progression has happened since DSBM. I came here and on day 1 it went out of the window. It was very difficult to actually understand where the priorities were and to an extent I felt as though I've walked into a universe which hadn't existed to me before and where I couldn't tell what the priorities were. I couldn't tell where the urgent needs were, where everything seemed to be urgent. There were some systems in place that I could recognise. There were certain people that I could share the language with. So, I could talk the common language. The only thing I really recognised was the desk and a chair. In my own mind there were only two options: it was a case of panic and run away from the whole thing or ... confront it all and try to get to grips with what's going on. It's the second option I chose. There were so many opportunities. There are so many things for me to add value to. So, it

became quite a big challenge for me and the more I did the more challenging it became. I've put a new plan in place for the support staff that I would have to cover in a wider school aspect as well. Now this hasn't been here in years. Now, I'm starting to be able to direct some of it and I know what's coming now.

I think DSBM prepares you very much for an educational world.

I'm saying how like a small business the school is, yet it seems to be quite a controversial thing in school to talk about. But schools are small businesses; they've got so many similarities with a small business.

This is a very different definition of business and I think to try and improve the operation of the school, you have to look at it differently. You have to look at it from that perspective because the public sector can learn a huge amount from the private sector and vice versa. I've invited quite a number of my former colleagues to come along and have a look around and each one has said the same thing: "Wow, we didn't expect it to be this big. Well, we didn't think you were going to a proper job," and I said I'm actually doing a proper job.

We have about 40–45 support staff. I have an overall responsibility for them but each of them has their own line managers. Now the structure is a little difficult, far too loose for my liking really, and over the last 12 months we've sought to try and put a structure in place that is workable.

We're going through a bit of a training process, a coaching process there. Again, it's one of those things that I expected I could absorb in those six months and that wasn't the case at all. In a way I underestimated the time that we need to do that, but we're also focusing very much on how people can help the school to deliver a better service.

But in some areas, such as painting and decorating, you don't need to be Van Gogh to be able to paint a school, the wall or all the rest of it. We have caretakers who can do that. Then we've taken [portable appliance testing] (PAT) in-house. We've just sent somebody on the training course to do that and he's come back full of the joys of PAT. It was just beyond my expectation but nevertheless he's doing that. We've found a health and safety course for somebody else to actually become a health and safety officer so we can take that away from a teacher.

I'm also hoping that support staff will then take on the role of performance managing their colleagues. I've started giving people some training and coaching in how to do a performance appraisal. So, the coaching aspects of leadership were coming out of me.

The financial set-up that we have here is not robust enough to support the school and we're looking at that at the moment, and putting various things in place to help support the ladies that we've got in the office. I've been encouraging some of the admin staff to do CSBM, fabulous course that, and the more people that do it, the better.

It is just taking time but it's trying to almost foster that culture of "try, give it a go". What have we got to lose? Somebody did it wrong, so we'll learn from it, we all make mistakes. If things go wrong a second time, then we can question what's happened here; and then beyond that, we

do start to get a little bit more anxious and wonder whether we have the right people in the right role.

In a couple of places we realised that we haven't got the right people in the right role and they're never going to get any better. We had a science technician doing a librarian's job and we wondered why it wasn't going well, and so we unscrambled that one and then we transferred it around a little bit and now we have a very happy science technician being a science technician, and we have a qualified librarian doing the librarian role. So it's those kinds of things, but there are so many balls to juggle, so many priorities that keep coming up the list.

In terms of the future for a school business manager like me, I can see being the ... strategic leader in charge of the business side of a federation of schools, visiting them all and then having one day at base. For those kinds of schools where you are putting four or five schools in a basket together, it happens almost by chance, I don't know what you would call it. You would have a headteacher as a chief executive; then tackling the business side you might have a resource manager, a procurement manager and somebody as a financier or an operations director, something along those lines. I mean they are the areas for people like me.

BDP case study 27 (DSBM headteacher)

There are 1,271 in the school. It's a rising pupil roll unlike most of our competitors, who are suffering falling pupil rolls. The context is interesting though. We have above-average free school meals. If you get two parents with the same name, then you are lucky. Drugs [are] a big issue in our area.

We made a conscious decision to appoint a school business manager. The opportunity arose because one of our assistant headteachers in our management team was promoted to deputy head. Our view was that it was best to rip up the old way of thinking and go for an SBM. The educational world was changing with workforce remodelling and with that the onset of the philosophy that goes with the Teaching and Learning Responsibility payments (TLRs).

We had a deputy head who had some responsibility for finance, much of the aspects of it were covered by me, and we also had other senior staff who were involved in non-direct learning activities. We also felt that we lacked a certain expertise linking into the realities of the outside world anyway. Having had a school business manager now, we couldn't afford not to have one now. We couldn't cope without it now. There's no way.

So for a school business manager, we needed someone with an external perspective, someone from the private sector. We were interested in the skills that our SBM was bringing in from the private sector and that also was reinforced by the fact that she was studying for the [DSBM] course at the same time. So, that gave her clearly an edge in terms of her interest, mostly in the educational world but also by bringing in a set of standards, rigour and a different outlook. It's been an interesting year on both our sides. She's been able to bring in a rigour in terms of ...

contractual arrangements; that's now her aspect, as well as financial management in terms of the strategic level, and also on tightening up on some of the more specific aspects of financial management.

What it means is that somebody who is expert in teaching and learning can do that, rather than wasting their time doing a job they were never trained for and are probably not very good at.

There's far more curriculum development and in fact the deputy is released for a lot of the time, but this has also released the creativity that goes with time. Before, he was quite conservative about curriculum development, but because the SBM is here we've been able to do things like [sending] him off to Boston to a conference to meet some of the sort of world leaders in innovative curriculum. He came back and converted me. And because of that we're able to accelerate the transformation of curriculum here. We've got the time to do it, which he wouldn't have had it if he had to deal with finance.

But we do believe that if you now stretch the individual in the organisation, you have to take risks. So, we do a lot ... two of our sixth formers are actually full governors on the governing body. Pupils are very much involved in the development of the curriculum. We have research groups.

There are constantly new things that come in because it's such a rapidly-changing world though. The SBM has been involved in things such as creating a business trying to take over the convent building next door to us. She was heavily involved in designing of the facts and figures and in the work behind teaching and learning responsibilities.

We've had a very significant personnel issue where we dismissed a member of staff. So, she's worked alongside our external side and she's been working through that as she's becoming sort of expert ... in employment law as well. But she's also gone into the classroom and worked in business studies with pupils. She's been involved in the appointment of staff and developing the role of pupils in the appointment of staff. I don't know whether she actually goes out into the business world and admits it but I think some of our cultural aspects have rubbed off on [her]. Yesterday we selected a couple of pupils in Year 11 for her to mentor as part of their exam preparation.

The role has changed in [her] second year. It will certainly change again going in up into the next year and looking how we develop it further, so that we touch on the expertise that Debbie brings in to make sure she doesn't lose some of her expertise by being out of the private sector.

As part of [Building in Schools for the Future] (BSF), we have a massive redevelopment programme here and I'm very keen to try and bring business and industry much more closely into this school. Because we're an all-girl school, we have to go out and challenge some of the assumptions about the world of employment as well.

So, it's trying to make sure that we were increasing the learning of everybody, whether you are the caretakers, on a whole range of courses, and their IT skills have greatly increased. The SBM has helped to devolve responsibility down to support staff and also we've developed a

sophisticated performance management system there.

All the staff training: the support staff as well as the teaching staff ... have been to Cuba, to Australia, Canada, United States, and we deliver training around the world now as well.

Having an SBM has helped me personally in taking away some of the weight of some of the strategic work that I had to do. It helps greatly when I've got somebody more as a sounding board with developed expertise. It's a support ... for instance, when we had a personnel issue. We were able to have somebody that's developing personnel expertise; as well that brings the different kind of rigour from the outside world to the educational world, which I think is happening more and more anyway. I mean in workforce remodelling, we are having more and more non-teaching staff as part of our employees. So, we have to make sure we develop the right kind of support mechanisms but also the right rigour for things like absence-management policies.

A real benefit is the amount of additional work that the SBM takes off me and deals with. You need to encompass things and she's brought back strategic planning elements that sometimes do not come easily for teachers. We need somebody who brings that kind of elements from the outside world in, but sometimes I need the elements of ruthlessness in to lead and modify. So, her role will become more strategic, making sure that we have the trained expertise below to carry out ... day-to-day duties.

We've already talked about [her] role developing into where [she] almost shadow[s] me as a different kind of PA that strategically advises and works as a longer term strategic business manager, because I think we're already raising income here through using our expertise as intellectual capital.

You create a relationship with a company. We are looking to take over the convent ... turning it into business with maybe small businesses centred there. But we'd like our own pupils to run the centres. I mean some of the best things we get out of our pupils [are] when they go on work experience, when they are in the real world at work. I'm not a great believer in schools. I think schools hold back the learning, and I think they learn very rapidly outside.

The support staff is growing. We have to make sure that we treat them in the same way and we involve them in their personal development because otherwise people will become frustrated. They won't feel as though they fit into the organisation.

Anybody who's been through this school system and tends to stay in a bursar role within the school system would need some time out to go and work in industry for a placement, just to get a feel of how it's like outside. Otherwise you get ... stuck in the internal politics of school work, but to see it set in a different context makes you step back and actually look at how you're really employing those skills and how you're going to bring other skills back in.

The message of this school is to see many have a worthwhile meaningful life ... [She's] doing something useful. [She] just came in the management team for changing people's lives ... there's nothing better than that.

BDP case study 28 (DSBM)

The school was built in 1942, right in the middle of the war. It was a private school. It was actually built by the Joseph Rowntree Foundation who still have a presence on the governing board. We're voluntarily controlled nowadays but they still appoint five governors and the chair of governors has always been from the foundation.

The present head has been here eight and a half, nine years. Our pupil roll is 1,262, I think; there are just under a 100 teaching staff. I have a staff of 62 and then if I added in the catering staff, we'd have another 34, so it's big. My title is school business manager. I've been here just over five years. I came in December 2000. One of our most respected teachers here ... having a chat the other day, said, "Do you know what you're known as?" and most of the teaching staff said, "You all know he is the man who gets things done," and he said, "We never had that before."

We were, until really about 20 years ago, a big centre for rural craft and we're lucky, we have all this land. In fact, we had more land at one time. But if you'd come here in 1942, you would have seen children driving tractors, ploughing, because the school was self-sufficient in food.

In my earlier career, I was, for many years, in London with firms of surveyors and valuers, mainly in the commercial side and enjoying the late commercial property boom of the 1960s, and then I got a job with a major airline as their assistant property manager in Europe. However, there's more to life than property. So, I started studying there and eventually came out as a chartered marketer and now a chartered manager.

That really began to push me in a completely different area although ... always property orientated, but I did find that my marketing and management skills were something I really enjoyed, and I ended up as industrial development officer for a large northern city. I got a major bank to move out of London ... creating something like 4,000 jobs on the back of that. I persuaded a national supermarket that they should actually open their first store in the north because up to that time the philosophy had always been that they would not have a store where one of their sales reps could [not] get to and back in the day.

When I came here the job was a new post. And the key question was, "What do you want this person to do?" The answer was everything. And that's how the job description evolved ... I'm sure that somewhere in the background to looking for a bursar and the CSBM course is the Joseph Rowntree Foundation, because my original job description is virtually what has been printed in looking for a bursar and it is uncanny, absolutely uncanny.

Having a school business manager was quite a culture change for the school. I was made very welcome, I have to say, right from the beginning. They have been used to, if you like, an old-style approach and things plodding along; for example, we had one caretaker who sort of started at 6 in the morning but nobody could understand why he went off at 2 o'clock in the afternoon. We now have three site supervisors who are in a rota. I looked at their budgets and realised that they only had an income out of lettings of £3,000. But within 2 years I've got that up to £50,000.

On the CSBM (which I did first) my tutor's style was first class, absolutely first class. Her criticism was always so positive and creative, and it didn't upset anybody. In fact, it was a positive strength and it acted as a motivation, which was terrific.

Going down to NCSL – this was during the DSBM – we had breakfast one morning with a group of super heads – I mean super big-heads would have been nearer. They were so scathing: “Oh, you can't possibly know what's good for a school,” and ... we just sort of looked at each other.

I have brought about a number of improvements: we were able to pull together in the accountancy side, which is far better now, with the result [that] teachers don't touch the money.

I liked the DSBM a lot but I realised that it was a pilot one. When we first met up, the first session of the DSBM, my group included a deputy head who clearly thought that he should be in the chair all the time. He was just given a total roasting and he was very angry, and actually he went away the first lunch time and I think he walked around the pond and then came back and sort of apologised to the group. He said “I've never experienced a group like you before because I'm so used to being in charge” ... after that he sort of relaxed but he didn't come back.

I found out about the courses from the local authority and the local authority here has been very good as an authority. It now holds about one bursars meeting every half a term, a full-blown forum for secondary and primary SBMs to look at different issues, and it's working extremely well. The competition element in schools is virtually gone. We are actually helping each other to save money.

One of the other things that I feel should happen is, under the new Ofsted framework one of the inspectors ought to be a bursar because, quite frankly, I could walk into a lot of schools and really find out what's going on. You know, just key questions, particularly in areas of compliance, and you would know whether they were doing their job properly.

The admin structure of the school is headed by me and below that we take the seven areas that are laid down in the CSBM. So, I have an admin manager and she has the largest number of staff under her, and increasingly they're becoming more technical. Then I have a finance manager who does an increasing amount of stuff. We spent our money well. We found out where the grants are and we've gone in for them, we got them.

We then have human resources and training manager. Again that used to be done, when I came here, by the finance officer, goodness knows how, I don't know where she found the time. There was no training budget for non-teaching staff then, but there is now. The governors have been involved. So, we do have a lot of training going on. We then have an IT technician who looks after the network and ... that's been taken away from the head of IT. We have the resource development, through the technician. We then have all the other technicians in science, we have a general technician as well, which ... was ahead of the game in terms of workforce remodelling.

I have also what used to be called the learning support assistants, who are now teaching assistants. They come under me and [work] with the SENCO and the head of the support centre,

which I think is an inclusion centre really. Finally there is the site supervision which is under the facilities and really has wide-ranging responsibilities. Our site supervisors are all trade trained, so again we've saved an enormous amount of money.

One of the governors said to me, "I can't believe how this place has changed in five years, and ... we've got the new dining rooms created out of what was there and the physics labs. Oh, that's a ramp there and there is a kind of footpath there." But when we go outside there's a squibbly red brick road, as it's known ... and then we've put picnic tables there and ... things have evolved. So I know I've had an impact, because when I look back at my reports to governors and we tick off the things, particularly on the premises side, but we've also ... had an input into things like the way in which IT runs the set-up.

We have a problem here that we are almost stuck to physical capacity for electricity. In fact, if we had 10 little electric fires simultaneously put on, it will blow the whole thing. The realities of that ... had enormous impact on use of energy. We've almost halved our energy costs.

I've changed the culture of the school ... the first thing I could not understand was why support staff did not come into the briefing, and one of them said, "Well, not all are allowed in," I said, "What do you mean, not allowed in? It's a staff room." "Oh no, it's the teachers' room." I said, "No, it's a staff room."

Most companies, I think, are very keen to train their staff and the attitude is that there is always the risk that we are training and they might leave, but if we're a good company we'll keep them, and that's cheaper than trying to recruit.

It was good to be invited onto one of those pre-headship planning groups where there were five SBMs, five deputy heads who were doing their NPQH, and then five middle managers. It was a fantastic group because again you had all the factions and the deputy heads admitting that they didn't actually know what SBMs did. After we had our first dinner together, the next couple of meetings were absolutely brilliant.

You know NCSL has always been positive; it's always been, yes, yes.

BDP case study 29: headteacher comments (secondary)

Our catchment area is about five miles ... in a circle, sometimes eight. I've been here 13 years. I came from a city technology college where they had [and SBM] from "the off". ... a city technology college is a much more commercially orientated place – outcomes driven. I think they probably appointed a business manager before they appointed a principal.

We've had a business manager from about 18 months into my headship, before that a deputy who retired early did it. We were a grant-maintained school ... when I thought about what he did, I thought this is crazy, but ... the actual moment at which I thought this is crazy was when we were having the technology block redone, and it was all shrouded in fences and whatever,

and the foremen came to me and said, "What colour do you want the rooms painted?" "I can't tell you." Terry [the deputy] was teaching French. I thought, "This is absolutely mad." You need someone who can say, "I want it white or whatever colour, now," not wait till the end of the French lesson. For anybody who does teach, including me, teaching is sacrosanct ... you either teach or you don't. You need someone who can be on hand for all those sorts of decisions.

Anyway, when Terry retired, we got a business manager, who was here for about 10 years. To cut a long story short, he was 49 and he was a bank manager and he was approached. He said, "Well, I'm 50; they'll chuck me out anyway. I would love the job." And he did it for 10 years and was excellent.

The business manager brings greatest value in looking after ... the school ... at a fairly strategic level, and not costing us the same as a deputy head. The business manager must have a strategic view of the school, and is part of the senior management team ... when I came here, they had just gone down to two deputies from three, which was very expensive, and ... I suppose it was two years ago we went down to one. I've headteacher colleagues who say, "Oh, I've got a deputy head who does that," and I think "Oh, more fool you." I don't see the sense of one person doing the two roles because something will suffer, and that would be both jobs.

For the redevelopment of the school there is a plan ... We actually possess papers that show the school is to be rebuilt. I think this is a bit ambitious ... And BSF, it's about flying pigs ... and it irritates me when people say BSF because it isn't going to happen. This authority is the wrong colour for the government and it's selective. So, it's not flavour of the month. And resources always go to the east side [of the county] because on any deprivation indices, they are bigger. Everybody says that we in the west are perfect, but the school's falling apart. The school is in the west of the county, so it won't happen. We have a plan on paper for redeveloping the whole school ... we've got £1.2 million out of the council which I think is quite good because they only get £14 million and ... it's interesting, we're quite close to the border here and I met a colleague from a school in the next authority which is not a million miles away, at a sports college conference. So, he's having some work done with a grant, from his county council, of £7 million, when nobody would get £7 million from our council because that would be half of what they've got in total, and there [are] 99 secondary and 600 primary schools.

We had to raise £100,000 for specialist status and we did it. We got about £8,000, I have to say, off the parents, not through donations, through fund-raising things. The only way forward is business partnerships and that is part of the task of my business manager, to talk with them. And there aren't a lot in this area ... the number of people that run farms, and they employ one ploughman with a tractor that you drive with a computer, but many of the farmers there had a business development site on their farm, and they might have a few cows as sort of a souvenir. Leisure and tourism is what most of the kids here do.

In GM (Grant Maintained) days, not everybody had a business manager, and heads knew the budget and wouldn't let go of it, and pushed themselves into stress but could quote you every last sub-clause of every whatever. They did it all themselves. But you don't need to. Get a business manager.

Vignette 1

The bursar works in a large primary school made out of the recent amalgamation of an infant and a junior school on the same site. It is probably, she thinks, the largest or second-largest school within her local authority, with a pupil roll of around 470. The school is in a rural part of central England. Before the schools amalgamated, there were two bursars, but on amalgamation, this bursar applied for the new job and in her view, as a result of doing CSBM, was appointed. Presently the school is an enhanced resource school and has 87 staff, 21 of whom are teaching staff. The SBM line manages the administrative staff, the lunchtime staff and the site staff. The SMT has not been fully working as the head has been ill, and the [special educational needs coordinator] (SENCO) left. This meant that most of the leadership of the school has fallen to the deputy and the SBM. In this capacity she has been on the SMT for two years. In recognition of this, she advised that her salary was on an Senior Officer scale, and above that paid to almost all other primary SBMs within the county.

She has been able to develop her leadership abilities partly as a result of her increased knowledge and skills obtained through the CSBM course, but also through being able to exploit opportunities within the school. These have been occasioned particularly because the head has been absent on long-term sick leave and the new head doesn't take up post until September next. This has meant she has been responsible for preparing the budget and all matters financial, meeting with the governors about monitoring, financial reporting and budgeting.

This bursar found CSBM particularly helpful as in her view it was the only course which she has completed which deals with the whole of the role. Her comments about local authority courses were that whilst they were "OK", they didn't encompass the range of tasks and the challenging nature of the role which an SBM presently occupied. Local authority courses were essentially functionalist. Part of her increased responsibility has included health and safety and the oversight, from the site angle, of the new building contract to supply four new classrooms. (The contract was procured by the local authority, but on-site administration has been handled by the SBM, who reported that CSBM had been a very useful preparation for such a task.) The course, in her view, dealt with "all of it", the wide nature of the role; the content, she felt, was excellent and it was particularly helpful being required to search out and follow up information. "The course made you search," she said, and as a result confidence grew.

Over the last three years the job has totally changed. Before CSBM, the role was just keying in invoices, but now it encompasses everything from the budget to overseeing the building works, hence a major increase in leadership activity. In her estimation, before completing CSBM leadership activity might have occupied about 25 per cent of her time whereas now it takes up in the region of 90 per cent.

In terms of relationship with the headteacher, the SBM pointed out that she felt she had been fortunate in having the opportunity provided by an interregnum, but that the introductory piece on the CSBM from Charles Clarke still needed to be developed. As one of the first SBMs – if not the first – from her local authority to complete CSBM, she has now taken on an

additional, informal role in advising and supporting other SBMs, and from this still is of the view that many headteachers are afraid of letting go, and need encouraging to make more of the people who have skills in finance which they do not possess. As an example of this, she cited the local authority's training in finance, which until very recently had only been for heads. After her protests, this was opened for SBMs, but upon doing the training, SBMs were reporting that they knew this material already, while clearly the heads didn't. In her view, the local authority is changing – its clerks' meetings have been changed to school business meetings – but there is still a way to go in getting provision to be suitable for SBMs from primary schools. Since completing CSBM, she has also taken on a missionary role in speaking to other SBMs, and for county in encouraging other colleagues to apply for the course.

Vignette 2

The SBM in this school, a large mixed comprehensive for 11–18 year olds in a wealthy part of the home counties, is unusual in that her title has changed from SBM to assistant head. The school, although in a fortunate position, does take pupils from a wide social spectrum, some coming from very wealthy backgrounds, while others are bussed in from outlying villages. Some pupils have very supportive, demanding parents but others come from unsupportive families. The school is housed in a late 1950s building originally developed for 500 students. More recently, a number of new blocks have been erected. The school has 82 teaching staff and about 75 support staff. Hers was the first state school in this local authority to have a bursar.

She indicated that her original reason for completing CSBM was that there was, at the time, a difficult relationship with some of the governors, one of whom was from an accounting background but simply did not understand schools. The SBM, although having worked in schools for 20 years, felt the need for some formal qualification as a form of defence against the governor. As a result of the CSBM she reported that her confidence had grown very considerably, and the certification gave her the professional status she felt was needed (and transferable skills). From her point of view, she described much of her career as being in the “right place at the right time”. The problems with the governor were resolved, as she put it, because he “fell on his sword,” and so opportunities presented themselves which CSBM gave her the confidence to take.

In particular she reported that, in addition to enhancing her confidence, whilst the course reinforced what she already knew, she stressed that modules on facilities and risk were particularly helpful. The elements dealing with HRM were also interesting and in some part a very helpful addition to existing knowledge. The course was beneficial in enabling the sharing of good practice and, as a result (in her view) fire drills have been put on a proper footing. She considered that qualification provided skills which could be transferred back to a business work situation if needed.

This particular SBM is unusual in many respects. She is now assistant head, which she says is in part recognition for the substantial amount of work which she does with pupils. Essentially she

juggles two roles, one of responsibility for the school business side of things and the other her responsibility for line managing the pastoral support in Key Stages 3 and 4 for girls. The other pastoral work is undertaken by a male assistant head but, as she put it, they share the work and play to each other's strengths. She was responsible recently for introducing and leading a new reward and behaviour system. In their recent Ofsted report the school was commended for its 'outstanding student welfare'. Pastoral work in the school is shared between teaching and support staff – for example, the head of Year 11 is an ex-Education Welfare Officer (and not a teacher) – but other pastoral jobs are undertaken by teaching staff too.

As part of her professional development, she has completed lay inspector training with Ofsted, which has given her skills to undertake classroom observations, a task which she now does along with all other members of the SMT. She is now going on to do NPQH. She stressed the operation of a whole-team approach; in her view there isn't a teachers–support staff divide. She indicated that some teaching staff don't know that she does not hold a teaching qualification. As a leader of support staff under her previous head, she was involved with him in developing workforce remodelling even before the pathfinder project was started. As a result she has worked as a workforce consultant to other schools in the local authority.

As a full member of the SMT she is involved in performance management of teachers as well as of support staff. She said that she had been on the SMT "since day one," though the previous head had suggested to her that she first attend only when they were discussing finance. Her reply to him was that she needed to understand the whole of the school. Therefore she needed to be a full member since all of the school's activities, and her responsibilities, were underlined by things financial. Her view was accepted and her role has grown from there. She has managed a change of head, confirming that she found the new one (in post for two years at the time of writing) to be supportive and to have been changed by the school. Her view of the local authority was that they were forward-looking and supportive of CSBM and, as she put it, "I get wheeled out" to encourage and support others who seek to apply for the course.

Vignette 3

This SBM works in a middle school deemed secondary, in a local authority in East Anglia. The school roll is just over 700 and is housed in a 1950s building. The buildings are of the older sort, though there have been some modern additions. The school is situated in seven acres of grounds in a village location outside a major market town. The school is now a designated eco-school.

The SBM reported that her job title has been changed from bursar to school business manager, at her request and after she had successfully completed CSBM. She said she really enjoyed the CSBM and always recommends it to colleagues who express interest. She warns them that it does take a lot of time to complete but, in her view, is well worth the effort. CSBM, in her view, empowered her, giving her the operational skills and knowledge needed to do the job well and to grow in the role as it developed. She mentioned details such as dealing with minibus safety

as an example of something she had picked up from other colleagues on the course. She has since completed DSBM, which she advised she really enjoyed doing as she found it a very different sort of course. Having two tutors for DSBM who were practising school bursars or business managers, she felt prompted to apply for a tutor post with the Eastern Leadership Centre. This will also enable her to put something back into the courses from which she feels she has gained so much.

Since completing the courses, she advised that her estimate of the time she spends on leadership activities has increased to around half of her working time. This has been facilitated by the redeployment of some other administrative staff, who now deal with routine finance matters. Her leadership responsibilities have increased to include support staff recruitment and a major development in financial responsibility. Her membership of the SMT (also a feature of successful course completion) has greatly helped in her discharge of the financial side of her work, as now she can hear and participate in the discussions about what resources are needed, and can immediately input into the meetings from her detailed financial knowledge of the school's accounts. The SMT includes the head, the deputy, three assistant heads and the SBM. In this respect the head wanted her paid on the leadership scale, but county wouldn't allow this.

She described the local authority as "not too bad," but felt there was more they could do and needed to do to help SBMs.

She indicated that the support staff now outnumber the teaching staff and that there are about 50 support staff of differing sorts in the school. These include six admin staff, the cleaners, the site staff, all of which she leads and manages, as well as teaching assistants, Higher Level Teaching Assistants, cover supervisors and lunch staff.

She indicated that responsibilities have "evolved," that she has been keen and willing to take on new initiatives. Originally she was put up for CSBM by the then chair of governors, and has since had a new head for the last couple of years. She describes her relationship with him as mutually very supportive: "he delegates and lets you get on with things," and he's really "the ideal head."

Her concluding remark was, "I'm really glad I did the bursar courses, CSBM and DSBM."

Vignette 4

The SBM in this school is called the school administrator, a title which she says she has had to fight for. Her school is a small village primary in an East Anglian local authority. The school buildings are old and traditional, but because the age range of the school has recently been extended from infants to include junior pupils, a new building is being planned for. The administrator has played a considerable part in discussions about the new school plans.

The administrator, who has been in post for 4 years, works part-time in this school (pupil roll is just over 60 at the time of writing, but due to increase) but as part of her involvement in the

local community, she is also the vice-chair of governors at a nearby high school. She provides some SBM cover for the high school, and has also been substantially involved in a range of building projects there.

She completed CSBM in one of the early cohorts and commented that she “could not fault the course”. She found that it reinforced areas about which she had previously been uncertain, but felt that after completion, she had been on a very full and demanding course which was comprehensive in its coverage. As an SBM in a small primary school she indicated that she is responsible for everything administrative and financial; she does the budget, looks after the premises management and just about everything else. Having completed CSBM, she then followed this with DSBM, which she said was a “very good course”.

In terms of her relationship with her head she reported that in the last three years she has worked with no fewer than four different heads. Of these she indicated that “the newer ones are better, because they’ve done NPQH and so know more about the wider side of leading a school.” The peripatetic head from the county who covered during the interregnum was more than content to let her “get on with all that side of the running of the school, because you know what you’re doing”. Her present head is supportive but her real difficulties are with the local authority.

This particular authority does not recognise the need for school business managers in primary schools, nor, she claimed, did they recognise the worth of DSBM. She cited evidence of four posts in primary or high schools where the appointees were all from outside education and none of them had completed CSBM or DSBM, a fact which, in her view, reinforces the local authority’s lack of recognition or backing for the BDP courses. These difficulties are compounded by the fact that her school’s governors are all very much in line with what the local authority says and so will not back her head in trying to promote her role. He would like her to be a member of the SMT but the governors do not think this is appropriate for a person they regard as “the school secretary”. She said that the finance courses provided by the local authority are appropriate for heads but do not support the need for and role of the SBM in primary schools. She is seriously looking for another post, either in a high school or in a neighbouring local authority.

Vignette 5

This SBM is the office manager at a smallish primary school on the south coast of England. The pupil roll is fairly static at 176; the school has a teaching complement of 7, with 15 support staff. The surroundings are leafy suburban and the buildings were erected in 1954. A recent project has involved replacing all of the windows.

The SBM used to be designated bursar–secretary and feels that her new title of office manager represents an increase in status. She is also clerk to the governors, but is not a member of the SMT. Since completing CSBM, she has increased her hours to full time, and after a short break

from studies on CSBM wanted to enrol for DSBM but was concerned that the entry criteria had been changed to include membership of the SMT as a requirement, thereby excluding her.

She has doubled the amount of time she spends on leadership activities, principally by taking on more of the work previously undertaken by the head, so she now includes health and safety, risk and all elements of this, all educational visits, all financial matters and the discussion and preparation of the budget. She line-manages the administrative staff, the site staff and the cleaners.

She found the CSBM to be a good course, in that it increased her understanding of the wider implications of school business management, particularly in dealing with the premises side, the buildings, tendering, legality aspects and development planning within the school.

She described her head, who has been in post since before she started CSBM, as very good, supportive and one who acknowledged what she does and can do. She originally found the details of the course, but it was her head who encouraged her to “go for it”. As clerk to the governors, she attends all governors’ meetings, presents reports on all of the financial aspects and also contributes input into the school’s [self-evaluation framework] (SEF), something which she had not done before.

She expressed concern that her local authority does not recognise either the CSBM or DSBM in terms of pay scales, so these are left to heads and governors, but with the authority moving to a single salary spine, the lack of job evaluation and grading recognition for the BDP courses is a significant obstacle.

Vignette 6

The SBM in this school is called the office manager. The school is a primary school with 14 teaching staff and about 40 support staff comprising teaching assistants, midday supervisors, cleaners, a caretaker and 3 administrative staff. The pupil roll is 226 and the school has a 40-place nursery. The buildings are traditional, about 53 years old but in very good condition. There are large grounds attached to the school and these are maintained by county. The school is situated in a coastal town in the east. The catchment area is not affluent; many families are on benefit due to low employment prospects.

The SBM indicated that her time devoted to leadership has increased significantly over the last three years. This has also included dealing with aspects of workforce remodelling, which has produced extra load and more work. Increasing time for leadership has meant taking on extra clerical staff for the school office. The hours of one of the staff there have been substantially increased and the SBM has gone up from part time, term time only, to full time. She is a full member of the SMT of the school along with the head, deputy, SENCO and head of the foundation stage. She is clerk to governors’ subcommittees and reports on all matters financial to the full governing body.

The SBM reported that CSBM had been an enormous help to her. She now feels she is viewed differently by all staff, as a member of the SMT and not just the person in the office who fixes things. She has taken responsibility for developing and maintaining a number of policies, which have made for a tighter running of the school.

She said the CSBM had been very instrumental in increasing her confidence, which had been gained through doing things like the compulsory presentation and speaking with larger groups. She now had much better report-writing skills. “I’m so glad I did the course,” was her comment; “I recommend it to all my colleagues who haven’t yet done it.”

Since completing the course, the school has had a change of headteacher. The previous head had encouraged the SBM to do the course, to develop the leadership side of her role. With the new head the SBM has had, as she put it, to believe in herself sufficiently to take on the leadership role, as she has been very much involved in the new head settling in. She provided the lead in the school gaining an Investors in People award three years ago and is now playing a major part in ensuring its re-accreditation.

Her main tasks include devising the budget with the head, and then monitoring all aspects of the finance and the budget throughout the year.

She described the local authority as “lukewarm” about the BDP courses, and CSBM in particular. However, she adds that “the county [council] have been helpful with tricky personnel issues such as a redundancy which the school had to go through recently.”

Vignette 7

A view from an external candidate

I think the danger was, to start with, that I’d come along with all this theory, all this knowledge, lots of which I had developed anyway through my commercial life. I found a sort of mismatch between what you’ve done on DSBM and what you find when you actually turn up in a real school. DSBM prepares you very much for an educational world. But that isn’t the same as preparing you for the real life of that world. A lot of things I would love to apply and a lot of things I’ve still got in my ‘first 100 days’ file – for instance, the business continuity plan.

There’s a degree of unpredictability. Things sort of happen for you to deal with and sort out. I find that in terms of the hours I’m working, ridiculously long hours. The more I talk to people, the more I realise what huge work I’ve been tackling and how lots of people are feeling almost exasperated, frustrated by the stress, which definitely does not help them. I don’t think it’s productive either.

There are just so many challenges. The bank where I worked had numerous views on every single sector that exists; it had to, because it’s in the business of lending money to people.

Now that I've actually done the DSBM course and a substantial period in a school, for someone who was a non-school-based background person who wanted to come from a business world to be a school business manager, DSBM needs topping and tailing. At the start, external candidates need to have a linked school from day one. Starting the course and then trying to find a better school later doesn't work, and I think when I started, schools generally didn't know what DSBM was. It's much more widely recognised now, after two years.

I'm not necessarily saying that crossing the border between the public and private sector is quite a distance to travel – we've talked of the language involved already – but I think a formal induction, almost an induction day, for informally chatting about the kind of environment that you're looking to enter, [would be worthwhile]. It's showing you what it's like and giving people the chance at that time to start paying more attention. This was how I was expecting it to look. Certainly the candidates who I joined with did have a drop-out rate which was quite substantial.

The induction part, they're helping with it in school – your understanding of what you're letting yourself in for, the level of the course as well. I think this course is a mixture of theory and practice. To an outsider, it gives you an understanding of how a school works but it doesn't show you right to the eyes, and I think you want to go and see that for yourself. I actually went and spent a morning every week in a school; that is a big thing, that made a difference for me.

And at the end, when somebody actually does get a job, when this is all converted into a business manager's role, giving them an induction period there at the end [of the course], to show them what use the bursar is. This 100-day plan that I talked about didn't work, but should it work? Why didn't it work? Because I'd not a clue what the hell I was really walking into. When people have finished DSBM they need another induction, acclimatisation or whatever, so that when they then get a job they can actually prepare a 100-day plan that makes more sense in the reality of what they are walking into.