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## Section 1 **Introduction**



### 1.1 **Aim of this report**

The aim of this report is to present the findings of an evaluation, conducted over the last three years, of the Certificate of School Business Management (CSBM) and Diploma of School Business Management (DSBM) courses.

### 1.2 **Structure of this report**

The report has eight chapters. This chapter outlines the context of the Bursar Development Programme (BDP) and of this evaluation, and includes a brief statement about the evaluation and the team that conducted it.

Chapter 2 describes the aims of our evaluation and a statement of its purposes. Chapter 3 explains our methodology and describes the development of our evaluation instruments.

In chapter 4 we focus on CSBM, with data on the course, the candidates and their responses to the experience, including an end-of-course impact survey. Chapter 5 examines the development and roll-out of the DSBM course, and provides data on candidates' views of the course and the impact it has had upon them professionally, personally and in their schools.

Chapter 6 presents data, gathered from headteachers and local authority personnel, on their perceptions of the programme. Chapter 7 gives an overview of the impact of the BDP and its two constituent courses.

Chapter 8 presents conclusions and recommendations. Technical appendices provide details of evaluation instruments and data.

Several case studies were looked at as part of this evaluation report and although they are not referred to within the document they are an important part of the data and therefore are available to read in appendix 10.

### 1.3 **Political and policy context of the BDP**

The nature of school administration has changed dramatically over the last 20 years, in how it is handled, where it is executed and who deals with it. Before 1988, local authorities dealt with a great many school-focused administrative responsibilities, but since then very substantial responsibility has shifted to headteachers and governing bodies.

Since 1988, schools have been responding to a growing number of government initiatives. For example, the last decade has seen the introduction of literacy and numeracy hours in primary schools, and the development of a Key Stage 3 strategy for secondary schools.

The transformation of information and communications technology (ICT) over the last nine years has been substantial. Schools have been involved in education action zones and Excellence in Cities (bringing in additional funding), and have been encouraged to bid for specialist college status, requiring them to raise and manage significant sums of money. Some schools have redeveloped their buildings through private finance initiatives (PFIs), and many will continue this effort with the Building Schools for the Future initiative.

One outcome of these changes has been a steady decrease in the number of teachers seeking promotion to headship, as administrative burdens increase. This was recognised in the report by PricewaterhouseCoopers (PwC, 2001), which suggested that:

*headteacher workloads are higher than average –  
by some 300-400 hours a year.*

It is in this context of an increasing and diversifying administrative workload that the role of the school bursar or school business manager has come to the fore. From an early study of SBMs (O'Sullivan *et al*, 2000), a picture emerged of the school bursar occupying positions varying between administrative manager, support services manager, business manager and leader. Their data suggested that the SBM occupied a less-than-visible role but one which would need to develop (O'Sullivan *et al*, 2000:8).

In 2001, the then Secretary of State for Education and Skills, Estelle Morris, recognised the exponentially growing administrative demands and burdens which schools were facing. NCSL was tasked with creating a Bursar Development Programme, to provide training aimed at the establishment of a profession of school business management, equipped to take on the substantial responsibilities of school administration.

The idea of a business manager as part of the school workforce is not new: there have been SBMs in the independent sector for many years. Some state comprehensive schools have had SBMs too, though in pre-1988 terms their role often amounted to looking after the school fund and monitoring capital expenditure. In state schools that opted out of local authority control following the 1988 Education Act, some enlightened headteachers saw the possibility of developing the SBM role to handle their schools' growing administrative and financial burdens. In the primary sector, SBMs have been much less prevalent. The principal administrative person in a primary school has frequently been the school secretary.

## 1.4 Policy context for this evaluation

In 2002, NCSL began the development of a programme for SBMs in primary, secondary and special schools. Many schools were already employing staff in a business management role, with job titles ranging from secretary to SBM and qualifications from O-level to Masters. NCSL was charged with creating a professional development programme to provide for this growing and important group. The aims of the programme (University of Lincoln, 2004:14) were to:

- train at least 1,000 existing and new SBMs by January 2006
- develop and implement a training programme
- pilot certificate- and diploma-level courses
- build a broader strategy for recruiting, inducting, deploying, developing and accrediting SBMs
- establish the school business management profession and, through these courses, help create a clear and transparent career pathway

The programme was conceived in two parts: a certificate course covering a range of operational areas (eg health and safety, risk management, ICT, human resources management), and a leadership-level diploma course dealing with strategic management, school improvement and change management. The certificate was intended as an entry-level professional qualification, and the diploma as preparation for more strategic senior management or leadership responsibilities. Both courses are structured as three, two-day sessions in a residential, face-to-face format, supported by an innovative online system of blended learning, and require the submission of rigorously assessed assignments. Both take between six months and a year to complete.

## 1.5 Evaluation of the BDP

An evaluation by the University of Manchester (2003) of the pilot CSBM course has been published separately

The University of Hull performed the present evaluation of the rolled-out CSBM and pilot and rolled-out DSBM courses, and the impact of both courses as perceived by participants and some headteachers between October 2003 and March 2007. The findings are particularly relevant in the context of developments in the leadership of schools and school administration.

## 1.6 The evaluation team

The evaluation team is drawn from the Institute for Learning at the University of Hull. The evaluation was performed by Nigel Wright, Senior Lecturer in the Centre for Educational Studies, and Professor Derek Colquhoun, Director of Research in the Institute for Learning. Professor Colquhoun and Mr Wright have extensive experience as evaluators, both separately and as a team. They have been able to draw on the significant expertise of others as the project has developed.

We would like to record our thanks to NCSL for its help and support in completing this evaluation. We have found this to be one of the most interesting evaluations we have performed. The subject of school business managers and their impact in schools has been genuinely fascinating.