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RESEARCH REPORT

The Age of the School Business Manager

SEPTEMBER 2015

ACKNOWLEDGEMENTS

08456 80 70 32

hello@weareevery.com

100 Wellington Street, Leeds LS1 4LT

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FOREWORD

On behalf of NASBM I welcome and support the publication of this research paper commissioned by Every.

As part of the ongoing quest to develop a self–improving education system it is vital that we undertake research and reflect on our own professional practice.

Listening to the views and drawing on the expertise of practitioners provides us with a deeper understanding of the issues and challenges faced by the profession.

I have no doubt that insights gained in this report will be useful to NASBM, but more importantly, the great number of organisations and individuals that work in the education sector.

At a time when the value of the School Business Manager (SBM) profession has seen dramatic growth, this report is timely and relevant.

The findings chime with the issues and experiences shared by our members, the need to engage in technological advancements to drive efficiency, the new levels of autonomy and complexity now associated with the role, and, in particular, the growing respect amongst senior leadership colleagues.

NASBM's work on the development of a blue print for practice excellence, via the Professional Standards Framework, responds to many of the issues raised in this study.

I hope this report will be a valuable catalyst in provoking discussion and debate, and in its own way, help raise the awareness of this essential profession.

Stephen Morales- Chief Executive NASBM

SUMMARY KEY FINDINGS

The independent sector has, for a long time, employed School Business Managers (commonly known as Bursars), but since 2001, when the then Secretary of State for Education, Estelle Morris, pledged to train 1,000 bursars by 2006, there has been an increase in the number of these posts in all types of schools across the maintained sector (Southworth 2011).

With increased autonomy from the Local Authorities, delegated funding, and policies, such as Extended Schools and Every Child Matters, academies and free schools, schools need to make decisions about how to use their funds and deploy resources. These factors lead to many believing that schools require Business Managers.

This research found that more than half of respondents were responsible for budgets in excess of a million pounds, excluding staff costs. But SBMs undertake a wide range of activities; they play a role in generating income, asset management, procurement, HR, health and safety, and office administration amongst other tasks. Consequently, the National Association of School Business Management (NASBM) and other stakeholders have updated the SBM Competency Framework (NASBM 2014). Furthermore, professional standards, for the role, are being finalised, by NASBM, to underpin the design of school business management qualifications, training courses and programmes.

In the last five years, the role has become increasingly more pressured, our research revealed. Nine out of ten respondents report they had taken on more responsibility. Over three quarters also report that the role had become more complicated and they need to deal with more paperwork, contracts and incidents.

Using technology effectively, SBMs can relieve some of the pressures within their role. Management software programmes, can help individuals save time, increase the accuracy of processes and improve efficiency. Unsurprisingly, nine in ten individuals reported that management software programmes were very important in making their role possible.

Encouragingly, the senior leadership team (SLT) are increasingly recognising the value of the role. Two years ago, less than half (46%) of respondents believed the SBM role was perceived to be valuable or essential compared to 84% today. SBMs are becoming integrated into the SLT, with four in five of those surveyed part of the team. In many instances the SBM is the first non-teaching position to be appointed, providing 'a sense of the real world' to the team.

There is evidence that 'appropriately skilled and effectively deployed' SBMs can provide the Senior Leadership Team in Schools with a 33% gain in efficiency.

With the SBM role increasingly becoming front-facing, in the sense of communicating with students, parents and stakeholders, there remains a need to increase understanding of the role within schools. Outside the school environment, the perception of the role is still misunderstood. SBMs and the associations are working together to change this.

THE AGE OF THE SCHOOL BUSINESS MANAGER

1) INTRODUCTION

Every, formerly TES Foundation, is an on-line business management system that helps school business managers and other staff in similar roles to efficiently run key aspects of their school including asset management, contracts, maintenance and quotes for work. The system is attractive to primary, secondary and networks of schools. This could be due to the management of schools becoming increasingly complex with increased school autonomy, greater government accountability, real time reductions in funding and a wider range of school structures.

Every commissioned Pedroza Communications and their research partner FireDog Research to undertake a study into the role of the School Business Manager (SBM). Specifically they wished to understand:

• How their role has changed and developed

• How they fit into the school management team

• How they use technology and where they feel it could help most

• Their views on how the workforce is trained and supported

• What they see as the big issues in school business management for the next five years

1.1) Methodology

In order to answer the above questions, FireDog Research undertook a mixed method research approach. They conducted a literature review to aid with the development of the online survey targeting SBMs. The survey was disseminated via a number of means – direct mailing of the clients database, social media and news alerts on the National Association of School Business Management (NASBM) website and within the School Business Manager Magazine. The survey was open for 4 weeks during July / August 2015, with 134 responses received. In addition, six in-depth interviews were undertaken.

An Advisory Group was appointed to monitor and guide the study. The Advisory Group comprised:

• Bethan Cullen, Marketing Director, National Association of School Business Management

• Val Andrew, Business Leadership Specialist, Association of School and College Leaders

• Nicky Gillhespy, School Business Manager, Cheam Fields Primary School and SBM representative, National Association of Head Teachers National Executive

• Chris Perry, Operations Manager, Multi-Academy Trust

• Mo Miller, Operations Manager, Multi-Academy Trust

• Russell Dalton, Finance and Business Director, Pershore High School

2) THE GROWTH OF SCHOOL BUSINESS MANAGERS

Few roles have risen so far and so fast as that of the School Business Manager (SBM) (The Guardian 2013). Whilst the Independent sector has made good use of such post-holders (Bursar) for over 100 years, the post was virtually unknown in the maintained sector until 15 years ago. In response to delegated budgets and responsibilities, the then Secretary of State for Education, Estelle Morris, in 2001 pledged to train 1,000 bursars by 2006. Today there are nearly 34,000 school managers, bursars and finance managers across state funded schools (DfE 2015), who are an integral part of senior leadership teams in many schools. The importance and number of the role is only expected to grow yet further (Southworth 2011).

2.1) Why the growth in SBM?

According to the National College for Leadership of Schools and Children's Service , (National College) about 90% of secondary schools have access to a SBM. The figure is significantly less in primaries, at approximately 30% (PriceWaterhouseCoopers 2010).

It is argued that these numbers make sense because of the nature of the role. Primaries are smaller, with more limited budgets. In some primaries, the traditional headteacher still keeps all the plates spinning, assisted by one or two support staff whilst the secondary schools have always had dedicated office staff.

However, the National College says that there is clear evidence that 'appropriately skilled and effectively deployed' SBMs can save about a third of a headteacher's time and five percent of the school's resources (DfE 2013).

The signs are that more schools, particularly primary schools, are looking to engage the services of a SBM.

The DfE's 'Review of Efficiency in the School Systems' concluded that one of the seven key characteristics of the most efficient schools is that they employ, or have access to, a skilled SBM who takes on a leadership role (DfE 2013). This led the DfE to provide start-up grants for clusters of primary schools to take on a SBM. These grants are now in place, demonstrating support for SBMs from the highest level (NASBM 2015).

Evidence such as the above is of course important. However, the changing nature of state-funded education, and in particular how that funding is administered, is widely regarded as a key determinant to the growth in the role.

The Open University suggests: 'There is an ongoing revolution in the running of state schools and this is making the position of the SBM both significant and necessary' (The Open University 2012).

The devolution of more responsibility to school level in the Local Management of Schools (LMS) and Grant Maintained Schools (GM) during the late 1980s, saw the initial emergence of the SBM in maintained schools. However, with more and more schools removing themselves from local authority control through academy status or working together in trusts or federations, the National College itself talks about the evolution taking place within our educational landscape (Earley, et al. 2012).

Likewise, policy changes stemming from the government's Extended Schools and Every Child Matters agendas for English schools, together with remodelling and changes to 14 to19 provision, will have significant impacts, in terms of how schools manage themselves. In practice, schools are already feeling the impact of such changes. These can include a parent's choice of secondary school, universal free school meals, changes in funding for special educational needs (SEN) and the requirement to register children for Pupil Premium. These are all examples of issues that affect the administration of a school.

3) SCHOOL BUSINESS MANAGER ROLE

The role of the SBM is still a varied one with the position taking many different forms in different schools. This is reflected in the job titles of those working in such positions. While the majority in our research (63%) were known as School Business Manager, 9% were known as Business Manager, 8% Academy Business Manager and 4% as Bursar. Other titles included Operations Manager, Finance and HR Manager, School Business Director, Finance Director, Academy Finance and Services Director, Assistant SBM or Senior Business Leader. Therefore, it is difficult to generalise the nature of the SBM role.

SBMs are considered to perform a critical role in ensuring the success of schools (DfE 2013). Yet in some schools, SBMs are not part of the senior leadership team (SLT). Nearly one in five (19%) we spoke to were not on the SLT.

SBMs accountability also varies substantially. The majority in this research report directly to the headteacher (89%), while others are on par with the headteacher and report directly to the governing body. Additional reporting lines included the Chief Executive, Deputy Head and in some cases SBM professionals are reporting to Senior Leaders in a more executive role.

Management of staff can also vary. Our survey found that 95% of respondents had at least one direct report but there was great variation. For example, one respondent, the Chief Operating Officer of a Multi-Academy Trust (MAT), had 100 direct reports; whereas another respondent, a Bursar in a MAT, had none.

3.1) Route to current position

It seems that there are three main talent pools that are developing SBMs.

• Pre-existing school support staff

• Individuals from the financial sector

• Individuals with background in operations and business development

Initially the SBM role was built on pre-existing school support staff. Already in post, managers/bursars/secretaries/clerical assistants/lunchtime supervisors would be asked to take on more or different responsibilities. Feedback from the survey demonstrates this:

"I've always done clerical work. In schools I started as a Clerical Assistant and Lunchtime Supervisor in 1991, progressed to Administrator in 1995 and Business Manager in 2008".
School Business Manager

"I was recruited as a School Secretary 10 years ago. The job has grown and was reviewed and measured against other similar roles in other schools and was upgraded".
School Business Manager

"I worked in this school as a Secretary and then progressed to SBM".
School Business Manager

Increasingly, the financial core of the role has led to Finance Directors and accountants entering the profession:

"I began in an accounts role in industry. I moved to a primary school at the inception of Local Management Schools (LMS) and cheque book control. I then moved to a SBM role in a smaller secondary school in the Local Authority and moved from there to the largest school in Salford as they began their journey under Building Schools for the Future (BSF)".
Strategic Director of Business & Finance

"I am a qualified accountant, starting in practice, transferring to industry and then onto the Education Sector".
Finance Manager

"I had 18 years with HMRC as an Inspector of Taxes and 5 years in Corporate Banking with Clydesdale Bank".
Finance Director

More recently however, people with a background in operations and business development have become interested in the role:

"I undertook Design and Project Management within the Civil and Structural Engineering sector, was a Regional Director of a Management Consultancy, and a Managing Director of an Engineering Company".
Director of Finance and Support Services

"I was an Operations Director and Head of HR in the Retail Sector".
School Business Manager

"I had a career change 8 years ago, from a commercial manufacturing company as Managing Director. I have now worked in three schools as a Business Manager".
Business Manager

Other suggested routes into the SBM role include the Armed Forces and Charity Sector:

"I worked in the Army (Royal Engineers) in a Leadership and Management role. My responsibilities included Facilities and Financial Management, Construction, Health & Safety, Fleet and Equipment Management".
School Business Manager

"I came from HM Forces".
Finance and Operations Manager

"I worked in the charity sector as a Service Manager carrying out financial, HR and client functions. I started at my current school as Bursar. My post was re-evaluated to SBM".
School Business Manager

To our understanding, there is no licence-to-practice, but job adverts do tend to stipulate the need for formal qualifications in business management, with many directly referencing the desirability of the Certificate for Schools Business Management. There are moves in place to set standards for the sector (see section 4.2).

3.2) Key activities of the SBM role

The activities undertaken by the SBM are wide-ranging. It is recognised that there is 'no one size fits all' Business Manager role, with the position and responsibilities varying immensely between schools.

Even within the last five years the role of the SBM has changed significantly (Figure 1). Nearly all respondents reported taking on more responsibility. The role has become more strategic and also more complicated. Consequently it has also become more stressful.

Figure 1. How the role of SBM has changed in the past 5 years

	Agree	Undecided	Disagree
I've taken on more responsibility	95%	3%	2%
It is more strategic	85%	8%	6%
It is more stressful	83%	10%	7%
There is more paperwork	81%	9%	9%
It is more complicated	81%	14%	5%
I manage more contracts	79%	10%	10%
I deal with more incidents	78%	7%	15%
It involves managing more people	74%	9%	17%

■ Agree   ■ Undecided   ■ Disagree
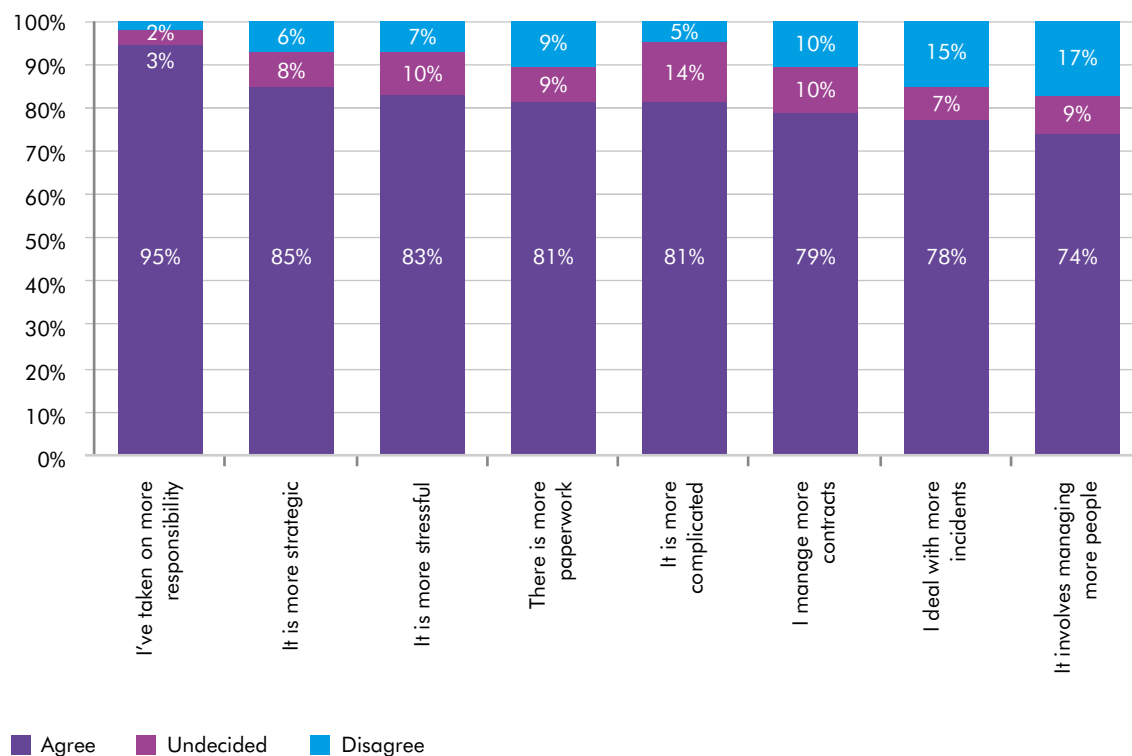
Base: 109 Respondents

SBMs routinely take on the core roles which a Director of Finance and Resources might undertake in a similar sized business. SBMs are usually responsible for budgets, income generation, procurement, human resources, site management, office administration and resource allocation. In brief, SBMs are as important in keeping the school running as other senior leaders are in keeping teaching and learning on track (SecEd 2014).

A Diverse Role

With schools needing to be run more like a business, one Operations Manager wonders if the role of the SBM is too wide and encompassing. The individual questioned how easy is it to find a person with all the skills needed to be a SBM. They believe that the structure of schools should reflect industry more – i.e. a Director of Education, Finance Director, Marketing Director, Operations Director and HR expert.

"The role of the Business Manager requires a wide breadth of skills - Finance, Marketing, Health & Safety and Operations. Within industry these are spread across experts in their field". Operations Manager

With ever increasing pressure on school budgets, SBMs also play a major role in generating income. For example, SBMs are managing additional activities such as the hire of school premises, bidding for grants and generating sponsorship.

An Operations Manager reports income generation is just one key activity of their role. School facilities can be hired 51 weeks of the year from 6am to 10pm and on Saturdays 8am to 6pm. Classrooms, particularly those with computers, are used to run evening lessons, whilst playing fields and sports hall are available to local clubs.

3.3) Pay scales

A further inconsistency across the role is pay scales. The Association of School and College Leaders (ASCL) and the National Association of Head Teachers (NAHT) ran a survey in 2014, which highlighted this (NAHT 2015). There is significant variation in how pay levels are set across the country, even for posts of equal responsibility, since the SBM's pay falls outside the school teachers' pay and conditions document and pay is set at a local level by employers. This information is now supporting the ASCL and NAHT's campaign for a fairer national framework that aligns the pay and conditions for school leaders who are not able to access the leadership pay spine of their other leadership colleagues (NAHT 2015 and ASCL 2015).

3.4) Fair National Funding Formula

Many SBMs also mentioned the inequalities of the funding system and how it affects their budget. For example, one individual we interviewed reported that their Local Authority (LA) was one of the lowest Per-Pupil Premium, whilst in a neighbouring LA the Per-Pupil Premium is £1,000 more. Furthermore, in areas where pupil numbers are falling, the impact on budgets can be substantial. The Government is working on this, recognising that it is unfair that a school in one part of the country can attract over 50% more funding than an identical school elsewhere.

This is at the forefront of ASCL's current campaign to achieve commitments within their Blueprint for a Self Improving System (ASCL 2015).

4) PROFESSIONALISM AND PERCEPTION OF THE ROLE

In 2001, the National College launched the first of a suite of programmes for SBMs. Ensuring the professional knowledge, amongst those undertaking the role was seen as a way of improving school effectiveness and releasing headteachers to focus on teaching and school improvement through pedagogy. The qualifications developed were:

• Certificate in School Business Management (CSBM)

• Diploma in School Business Management (DSBM)

• Advanced Diploma in School Business Management (ADSBM)

• School Business Director programme (SBD)

As the training programmes were established, the benefits and impact of SBMs became evident. SBMs have brought about financial savings, increased income, saved headteachers' time and improved their work life balance, creating more time for strategic leadership and enabling them to increase their focus on teaching and learning (Southworth 2011).

To ensure progression and continuity within and between these programmes, the National College developed a competency framework. However as the role developed, the initial competency framework and early qualifications were recognised not to cover all aspects of the SBM role. There was a strong focus on leadership, but as shown in section 3.2, the role encompasses much more than this.

Building upon the work of the competency framework produced by the National College, NASBM, working with SBM practitioners and sector stakeholders, have developed a new competency framework (National College for Teaching and Leadership 2014). It changed some of the focus of responsibilities to reflect the changes that academisation brought to the role. In addition, professional standards to cover all aspects of a SBM role are in development.

4.1) Professional Standards Wheel

The 'Professional Standards Wheel', created by NASBM, demonstrates the main requirements of the profession across both maintained (including academies) and independent schools (Figure 2).

The structure includes six professional segments and six attributes. Of the six professional segments, leading support services is seen to be core. The levels of complexity across each of these professional segments have been broken down into four tiers of professional development.

Figure 2: Professional Wheel

Source: NASBM

When we asked respondents about what activities they undertook, many were responsible for those identified in the Professional Wheel (Figure 2. Please note the Professional Wheel is subject to change).

4.2) Competency framework and standards
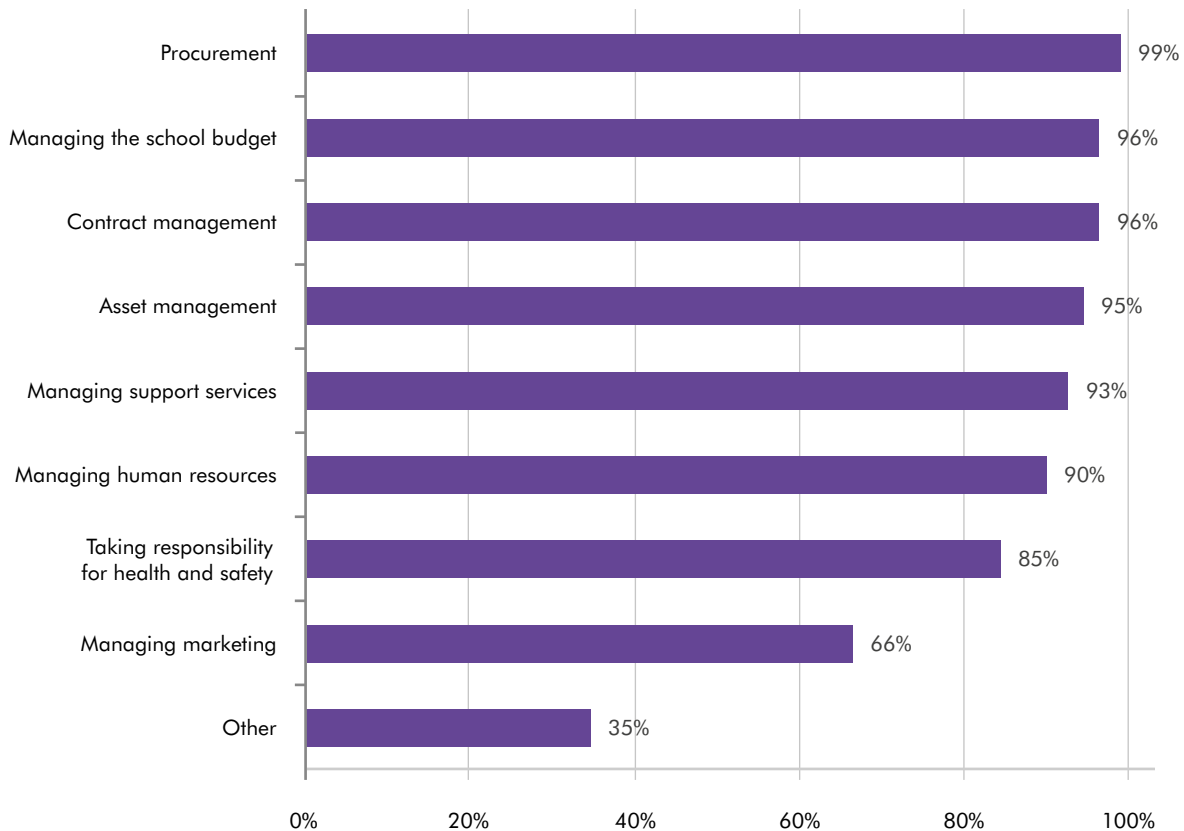
4.2.1) Competency framework

The SBM competency framework is used to:

• Underpin the design of school business management qualifications, training courses and programmes
• Inform school business management role design, recruitment and selection, performance management and succession planning
• Inform career development and continuing professional development (NASBM 2014)

Figure 3: Activities undertaken by survey respondents

Activity	Percentage
Procurement	99%
Managing the school budget	96%
Contract management	96%
Asset management	95%
Managing support services	93%
Managing human resources	90%
Taking responsibility for health and safety	85%
Managing marketing	66%
Other	35%

Base: 110 Respondents

The framework recognises the many varied titles and roles applied to individuals within the school business management profession, working in different settings and with different levels of responsibility. It identifies four broad levels:

• School Administration (SA)

• School Business Management (SBM)

• Advanced School Business Management (ASBM)

• Extended School Business Management, i.e. school business director (ESBM)

Furthermore, the framework also lists the professional attributes, knowledge, understanding, and skills, relevant to the different roles, covering the following areas:

• Managing self and personal skills

• Providing direction

• Facilitation change

• Working with people

• Effective use of resources

• Achieving results

In the last 12 to 18 months, ASCL has moved to describing the SBM role as "School Business Leader", echoing the terminology within the SBM Competency Framework and reinforcing that this role is integral to school leadership.

4.2.2) Standards

A major priority for NASBM in 2015 is the development of a suite of professional standards for SBM professionals, comparable to those already available for other staff in schools.

These standards are intended to:

- Set out the core and specialist areas of competence required to be successful in the school business management professional role

- Assist those currently working in, or aspiring to work in, the school business management profession to perform their role as expertly as possible

- Set out the content of both initial and continuing professional development for those entering or developing their career in the profession

- Provide a framework for the development of qualifications and other professional recognition for school business management professionals

The standards will be launched at the NASBM National Conference in November 2015.

As indicated above, the standards will provide the framework for developing qualifications for the SBM role. The National College has now stepped away from the design and provision of SBM programmes, enabling other providers to enter the market with programmes delivered at Qualifications and Credit Framework (QCF) Diploma levels 4, 5 and 6. This may increase the potential range of programmes available moving forward. For example, NASBM foresee a tier one entry programme, such as an apprenticeship programme and also a programme that would support graduates entering the role. Accreditation of programmes will be overseen by the Institute of Leadership and Management (ILM), who'll also monitor and quality-assure the training providers.

Foundation for Leadership in Education - new support for SBMs

The Association of School and College Leaders, the National Association of Head Teachers and the National Governors' Association are working with the Teaching Schools Council, employers and leading universities to create this foundation.

Launched in June 2015, the foundation seeks to develop new leadership qualifications and set standards. It is hoped to extend the scope to the professional development of all school leaders, including school business managers.

The new foundation will also help schools with their succession planning by developing a network of opportunities for potential leaders to experience a broad range of work in different schools. It will collect and send out the latest academic research about effective leadership, and host constructive dialogue between education leaders and policy makers.

4.3) Qualifications and CPD

Our research found that 76% of respondents held a SBM qualification. 41% reported having financial or accountancy qualifications, which reflects the financial background of many in the role, highlighted in section 3.1. Other qualifications held by those in our research included Management and Leadership, NEBOSH (Health and Safety professional), Facilities Management qualifications and HR qualifications.

Two thirds (66%) of those who participated in the research reported undertaking training or professional development in the previous 12 months.

NASBM reports that there is a greater appetite for professional development, which was reflected in all in-depth interviews undertaken. NASBM provide an annual programme of training and professional development opportunities and currently the most popular courses are:

- Academisation – opportunities

- Financial management - CIPFA programme for SBM professionals

- Income generation

"Professionalism across the role is increasing as the role continues to evolve. With the increase of federations / MATs, a greater need for specialism is being seen, for example Operation Managers, Facilities Managers, and HR specialists. The more generalist role of SBM might disappear – it's too much for one person".
Business Leadership Specialist

Consequently there is now greater opportunity for mobility in the role. There will be different routes individuals can take, depending on their ambitions, skills and CPD.

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Training or professional development which participants reported requiring in the next 12 months include:

• Multi-Academy Trust formation

• Updates on any changes in reporting requirements for finance or management

• Accounting qualification

• Leadership and strategic management

• Change management, academy status

• IOSH / Health and Safety qualifications.

• Advanced use of SIMs and budget planning software

• Finance and procurement

• Anything linked to academy conversion

• Effective use of Early Years Pupil Premium

• Budget training relevant to secondary school

• Financial planning

4.4) Perception

Given that the role is effectively still in its infancy in the maintained sector, it is unsurprising that there are still some suspicions about the role. These can reasonably be described as traditional 'bureaucrat v practitioner' criticisms.

As we suggest above, the necessity of being part of the SLT feels that it has much to do with gaining authority and legitimacy as well as being involved in the decision making process.

Our research demonstrates senior team leaders are increasingly seeing the role as an essential part of the school (Figure 4). Two years ago less then half of respondents (46%) believed the SBM role was valuable or essential compared to 84% today.

But perceptions can vary between types of school.

"The perception of the role is very different between independent and state schools. If you ask a head at an independent school who is the most important person aside from the head, the school Bursar / SBM will be mentioned, while in state schools they are rarely mentioned".
**Finance and Business Director, Academy School**

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In many instances, the SBM is the first non-teaching personnel to be part of the SLT. They can bring 'a sense of the real world' to the team. Teachers often have little or no experience of other sectors or roles and may not understand procurement, budget management or health and safety. This means they can have creative ideas but may be unaware of all the implications of those ideas. The SBM is able to provide a different perspective to ensure decisions are made after looking from all angles.

One individual spoken to believes that support staff are under-represented on the SLT. When you consider that 25% of the school workforce are non-classroom based support staff (DfE 2015), representation of support staff on their own SLT is just one of eight people.

It is clear from the interviews that the role is increasingly becoming front facing, in the sense of communicating with parents and stakeholders. This is a significant change and perhaps reflects the maturing understanding of the role as much as the evolution of school funding. However, outside the school environment the perception of the role is still misunderstood. Only half (50%) of respondents believe that the SBM role was perceived to be valuable or essential outside the school environment.

Figure 4: Perception of the SBM role by senior team leaders today, compared to 2 years ago
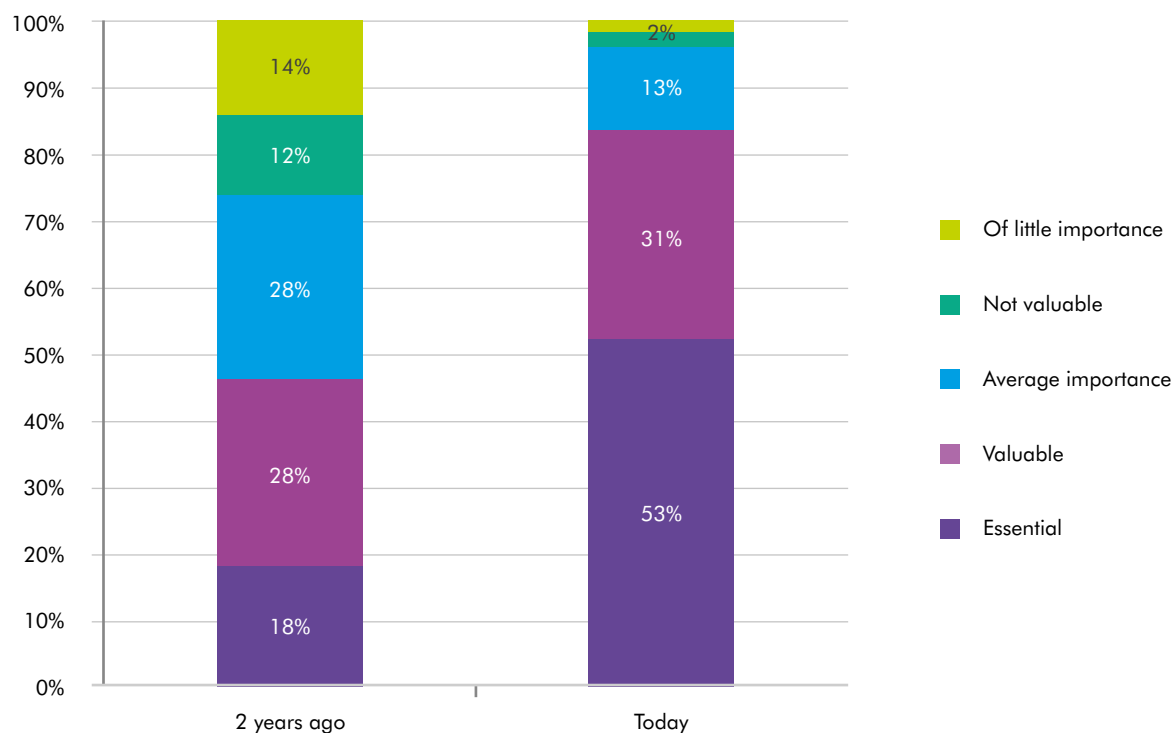
Base: 108 respondents

Understanding of the SBM role inside and outside school

The School Business Manager, of a primary school in the South East, believes that their role is perceived to be integral to the school by SLT, having increased over the years. This does relate to the fact that the Local Authority (LA) has delegated budgets and other responsibilities out to schools for the last 7-8 years. Furthermore, the LA expert that used to be available to give advice to schools in these areas has not been around for about 5 years. There is no longer any support for the school to turn to; the SBM must now be the expert.

However, outside of the school environment, the individual believed that many do not understand her role. They do not believe this perception will just change; there are simple things that can be done to increase the profile they report. For example, along with other senior leaders the SBM will go out to school entrances, before and after school, to greet parents and students. This provides the opportunity for the SBM to interact and raise their profile. In addition, the SBM will attend the lunch hall, to interact with catering staff, pupils etc. This increases their visibility, rather than just 'hiding' in the office.

5) THE USE OF TECHNOLOGY TO IMPROVE EFFICIENCY

With ever increasing pressure on school budgets, the need to make savings and secure better value for money is paramount.

5.1) School budgets

The majority of respondents in our survey managed some level of budget, with over half responsible for budgets over £1 million (Figure 5). A third (37%) reported that budgets they had managed in the previous two years had decreased, and an equal proportion reported that it had remained stable. Just over a quarter (26%) reported an increase in budget.

Those in our research, reported that the area where most budget is spent, is on support staff, followed by energy supply, IT and catering (Figure 6).

Additional areas of spend included:

• Health and safety

• Repairs and maintenance

• Exam fees

• Buying in of services such as clerking, insurances and IT

• Refuse collection, service agreements (e.g. intruder & fire alarms), first aid supplies

• Administrative materials, photocopying and printing

• PFI School - payment that schools have to make to cover management of site

• Licences, resources and supply staff

It is recognised that technology offers significant opportunities to increase efficiency across school operations, saving time in the process.

5.2) Technology and software management programmes

Software systems and technology allow for faster processing of data and easier retrieval of information. When people perform tasks by hand, it can be time consuming and full of human errors. When technology is used for repetitive operations, mistakes are reduced or eliminated, and the time it takes to complete the task is greatly reduced.

In addition to making processes quicker, technology also makes it easy to keep information up to date individuals in the research reported. Instead of searching through a room of filing cabinets and trying to see when an insurance policy requires renewal, a few clicks of the mouse can pull up all renewal dates from a database or alerts for dues dates can be set up. What used to take several minutes to an hour can now be done instantly. In a role where many SBMs frequently report being 'time poor' technology is vital.
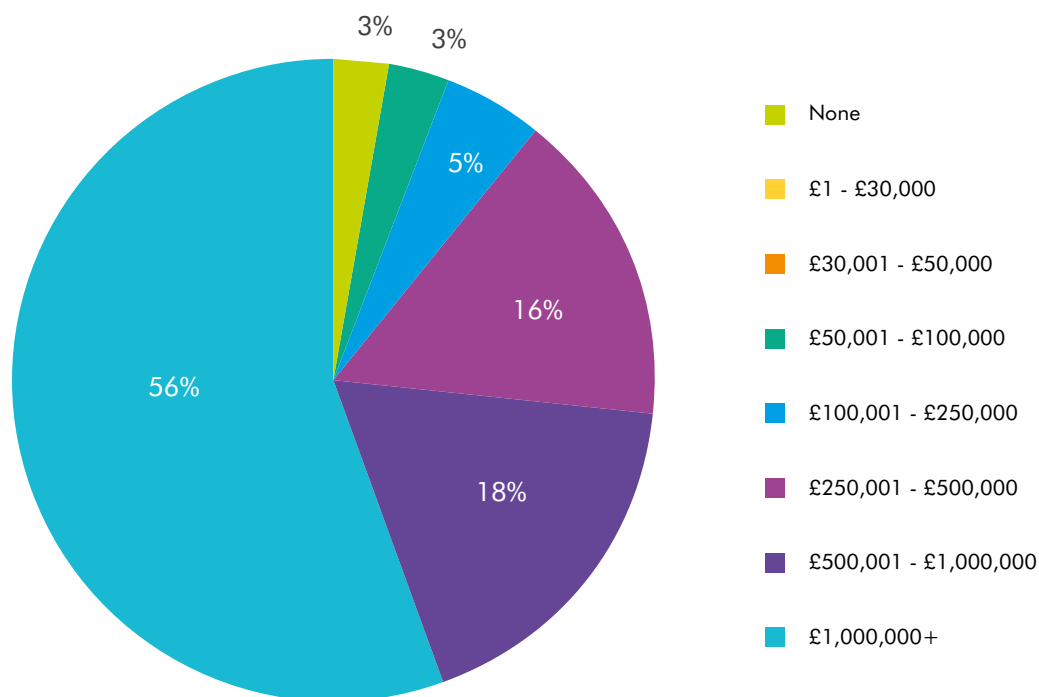

Manual to digital

"The use of technology in the school and across the role of SBM has increased over the years. Technology helps to increase efficiency and accuracy.

For example, signing into the school is now electronic rather than a manual register. This system links to school dinner orders and pupil attendance alerts; the catering staff are aware of exactly how many dinners are required, which is helping to reduced waste, while if a child has not signed in by 10am, the school can send text or email to the parent to determine reason for absence".
School Business Manager

Figure 5: Level of budget managed (excluding staff costs)

Legend:
- None
- £1 - £30,000
- £30,001 - £50,000
- £50,001 - £100,000
- £100,001 - £250,000
- £250,001 - £500,000
- £500,001 - £1,000,000
- £1,000,000+

Base: 109 respondents

Consequently, the use of management software programmes was considered very important by nine out of ten respondents (Figure 7).

In fact, 95% of respondents commented that they are reliant on some form of software system or bespoke software packages to aid and support their role.

Software programmes mentioned by respondents included:

- Microsoft - excel, word, outlook

- Capita

  - SIMS FMS for financial management

  - SIM.net for HR and pupil management

  - SIMS In Touch

- SBS (School Business Service)

- InVentry

- BlueSky Education

- Every (formally TES Foundation)

- Internet – online banking

Interestingly, the increased use of tablets and smartphones were also considered useful in supporting SBMs in their activities. Many report accessing emails – and being connected -outside of the school office as becoming an almost essential part of their role.

"Being able to work from home (out of hours) is essential".
Director of Finance & Administration

Figure 6: Areas where most budget is spent (ranking 1 – 9, 9 is the greatest)

Area	Value
Support staff	7.18
Energy supply	4.96
IT	4.77
Catering	4.53
Equipment	4.49
Cleaning services	3.88
Grounds maintenance	2.25
Marketing	1.28
Other	4.27
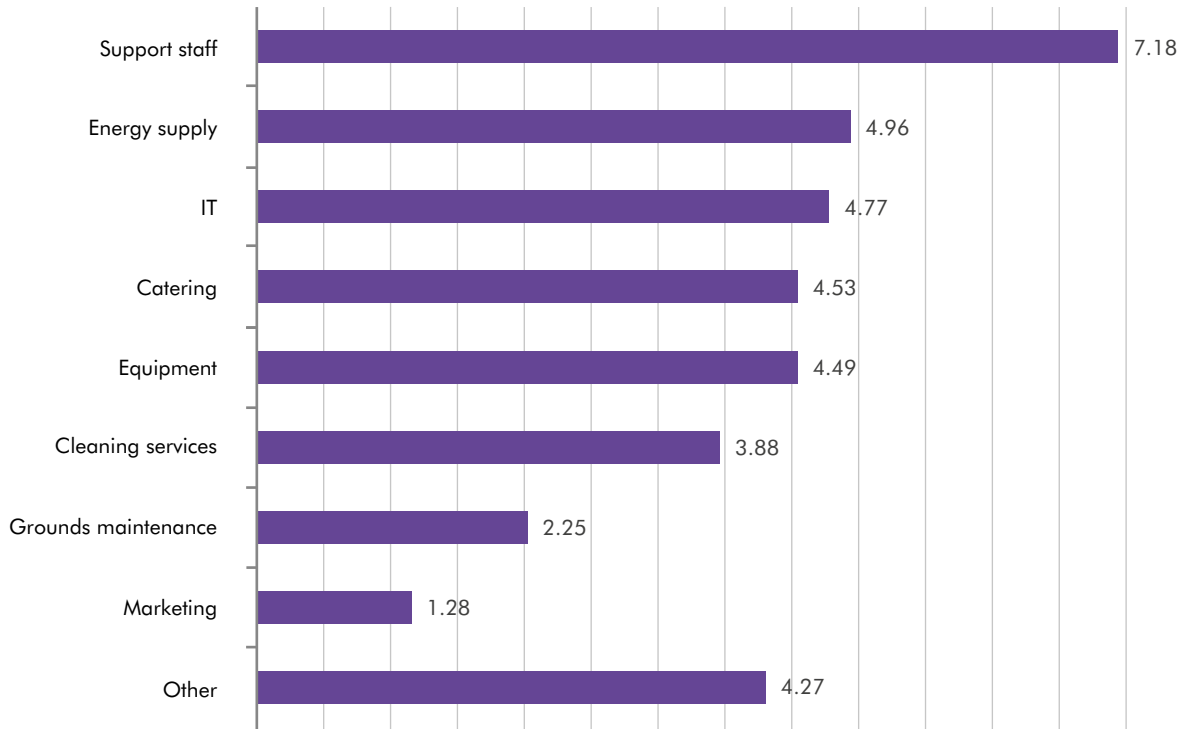
Base: 107 respondents

Smartphones and tablets

A Facilities Manager illustrated the importance of being connected and accessible as almost part of the modern, 'always on' work culture. With eight sites to oversee and six staff members, the manager is not always within an office or on the same site as a particular member of staff. Having a smartphone or tablet is an essential part of technological kit in order to stay in touch.

Furthermore, the manager reports that connected access to a cloud base application for facilities management is necessity. The software currently in use is now available as smartphone mobile app, which will be installed on all the smartphones and tablets site staff carry. Technological intervention – particularly hand held devices - will enable individuals to report immediately on the job outcome, log, create or notify remotely that a fault that needs looking at in real time or share information and data globally with the team – rather than returning to the office and then logging the information at a desktop computer.

The Facilities Manager reports that the use of technology, particularly in this way, makes, what they describe as a "mammoth difference" to their job role and overall efficiency. The manager acknowledges that users are initially nervous and sceptical about using new technology and IT. However, over time, working with the system provider, the software app is considered to be accessible, intuitive, logical, user friendly, with no way information can be deleted or shared incorrectly

5.2.1) Software improvement

As seen above, many respondents make use of a number of software programmes to undertake various tasks. It was reported that whilst there are a number of packages available not one appears to fully capture all their needs in one. Therefore, SBMs are tending to buy the best parts of different packages, but this has cost implications. Knowing which are best comes from networking and word-of-mouth from other SBMs. They will share good and bad experiences and whether they consider them value for money.

Consequently, when respondents were asked what additions they would like to see from their software programme, the ability for them to be better integrated was frequently mentioned. For example, linking a financial programme with an asset management programme would help with calculating and capturing depreciation in a timelier manner and ensuring all assets were adequately captured. More improved reporting capabilities were also requested.

The following was captured in feedback from study participants:

"Better reporting modules and more computability with statutory formats".
Bursar

"Better reports which Governors understand".
Bursar/Office Manager

"Complete interaction with one another with no need for synchronisation. Easy to use with easy to develop personal reports".
School Business Manager

5.3) Energy efficient technologies

Given that energy costs are second only to salary costs in terms of budgets, SBMs are investing in energy-efficiency technologies within their schools. The Carbon Trust estimates that UK Schools could reduce energy costs by around £44 million per year (Carbon Trust 2012).

Preventing school buildings from wasting energy due to unnecessary lighting, heating and heat loses can help save energy costs. Renewal energy technologies are a further

source of reducing energy costs. These are areas SBMs are considering when looking to optimise their budgets.

Business like cost management

The Operations Manager of an academy school recognises that costs, particularly energy, increase year on year, therefore sets a challenge each year to make savings in the region of £35k. The manager does this by looking at the longer term return on investment opportunities. One such investment is Photovoltaic (PV) technology. It will cost approx. £50k for initial installation but with an anticipated return of £8.5k per year it makes business sense to proceed. With any such decision the question "if this was my business would I make the spend" is asked - If not then they won't proceed. The Operations Manager believes that the running of the school should be like a business.
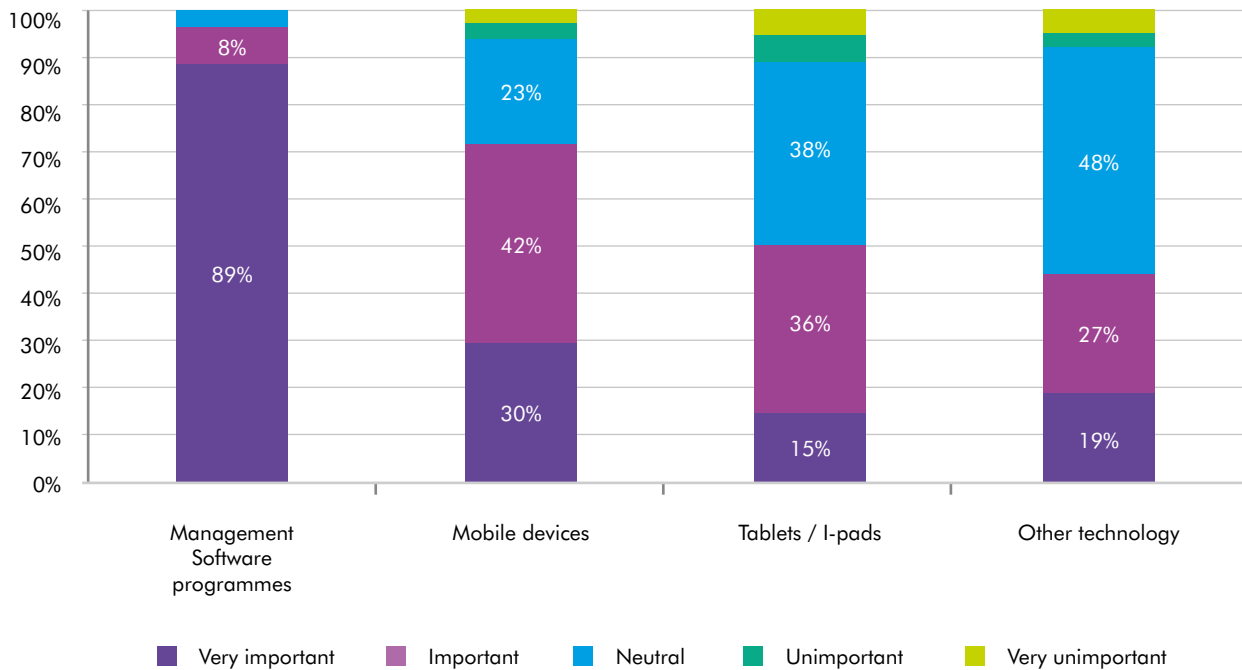
6) THE FUTURE ROLE OF THE SBM

There are a number of challenges facing SBMs in the future (Figure 8). The main one being the reduction in school budgets - a challenge recognised by nine in ten respondents. Two thirds also consider the increasing complexity of the role, more responsibilities and greater stress will be further challenges SBMs will face.

"The SBM role is key in being the 'conductor of the orchestra' and enables good business management across the whole school. But with the increasing workload and responsibilities the role is changing, with a greater sharing of the role and responsibilities but bringing even more complexity that is not helped with a lack of understanding of others. This may have a detrimental impact on the future effectiveness for school business management".
Bursar

Figure 7: Importance of technology in role

Chart data:

Category	Very important	Important	Neutral
Management Software programmes	89%	8%	
Mobile devices	30%	42%	23%
Tablets / I-pads	15%	36%	38%
Other technology	19%	27%	48%

Legend: ■ Very important ■ Important ■ Neutral ■ Unimportant ■ Very unimportant

Base: 105 respondents

6.1) Budgets and funding

School budgets for five to 16 year olds have been protected but those interviewed remarked that costs continue to grow.

Schools need to achieve greater efficiency but this means looking at all aspects of the budget. Schools spend most of their budgets on staff costs. On average, primary schools spend 79% of their budgets on staffing whilst secondary schools spend 78% (DfE 2013). Therefore, it is now also about ensuring the staffing structure is most effective for the delivery of the curriculum. Not all the necessary savings can be made with the remaining 20% of the budget where fixed costs do not offer the ability to make further savings.

The sector is seeing leadership teams shrinking. Many experienced Heads and Deputies are retiring. Leadership teams are therefore often leaner (saving money) but less

experienced which creates additional pressure on those responsible for leading schools, such as the SBM, within the ever changing educational and financial landscape.

"Less experienced headteachers who do not understand the requirements and boundaries of things such as Pupil Premium, accounting rules & laws, health & safety etc. can create additional pressure and this can be further compounded if they do not understand role of SBM or communicate well".
School Business Manager

6.2) Managing Collaboration

The educational environment continues to evolve rapidly – the combination of the Government's reforms, including the autonomy agenda and amendments to the Ofsted framework, is placing greater emphasis on school to school collaboration in all its varieties.

In light of this, many schools and academies are looking to explore how they can work together under the academy programme. They may be existing academies or schools looking to convert together or join with an existing academy. In some instances these schools may previously have been in competition. Joining together under the academy programme reduces competition but trust and respect needs to be built and the collaboration requires management. In many instances the SBM will take on this role.
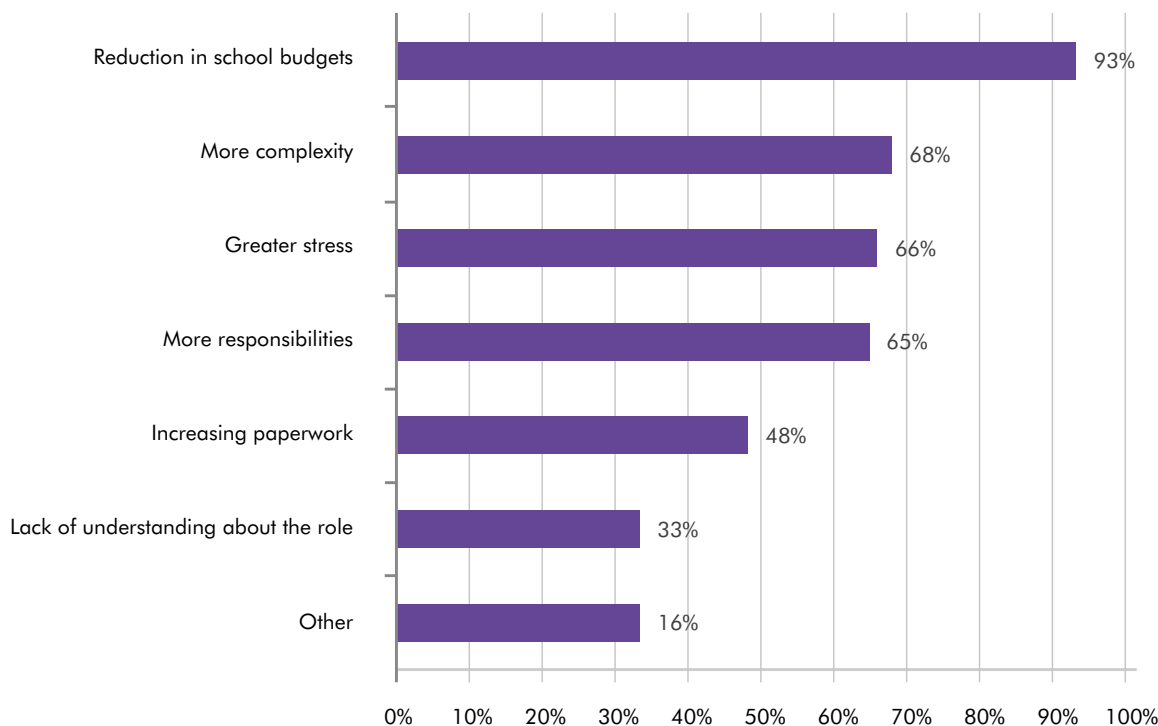
As we have seen in section 4.3 the top CPD courses for SBM include the academisation and the opportunities associated with this.

6.3) Policy Change

The education and regulatory environment constantly changes. SBMs need to be able to keep up and react to this. For example, one respondent reported that the Universal Infant Free School meal changes were a challenge, especially as the school had no kitchen a year ago. Catering services therefore had to be sourced and a new kitchen installed – an expense that was not planned for.

The associations, regional networks, publications such as The Voice, Leader magazine and Education Executive, and word-of-mouth provide valuable sources of information for SBMs to keep up to date with the many policy and regulatory changes and what impact these could potentially have.

Figure 8: Key challenges SBM will face

Challenge	Percentage
Reduction in school budgets	93%
More complexity	68%
Greater stress	66%
More responsibilities	65%
Increasing paperwork	48%
Lack of understanding about the role	33%
Other	16%

6.4) Enhancing the perception of the role

Even though the role has evolved and is acknowledged as key within the education environment by many, there remains a belief that more needs to be done to increase the perception. This is reflected in the following comments:

"There is a lack of understanding and appreciation from colleagues about the role. In addition, the role is so vast that there needs to be support for the SBM".
School Business Manager

"There is a frustration around the Local Authorities lack of understanding of the role and its standing in the school".
School Business Manager

"My Principal openly admits that he doesn't really know what I do on a process level but is fully supportive in trying to develop my role and the improvements and changes that are necessary having converted to academy status".
School Business Manager

"The remains a lack of understanding about the role from colleagues, some staff perceives the role as administrative".
School Business Manager

7) CONCLUSION – WHAT NEXT FOR THE SBM?

As suggested previously, the number of SBMs in schools is already significant. About 90% of secondary schools now have access to a SBM (PriceWaterhouseCoopers 2010). It seems likely that if more schools leave local authority control then the number of SBMs will inevitably increase and it can reasonably be assumed that the role will grow, evolve and change. SBMs will become more critical to schools as pressure is put on their budgets.

Evidence shows that the employment of a high quality SBM can enable schools to save significant amounts of money (PriceWaterhouseCoopers 2010). They are able to do so by:

• Implementing more efficient staffing structures

• Better management and negotiation of contracts

• Taking advantage of bulk purchasing opportunities

• Improved project management (particularly important in reducing capital costs)

7.1) Technology

Technology is key to helping SBMs make savings and increase efficiency. It is expected that technology will continue to play an important role; especially with the challenging budget constraints and the growing trend for MATs (Watson Buckle 2015).

There are a number of software programmes available to schools and in many instances schools make use of more than one package. Individuals we spoke to select programmes largely based upon recommendations from fellow SBM; different products have specific strengths. Feedback indicates that providers of the software are responsive to the school needs; however, the running of the school requires integration of all areas. Many in the research would like greater integration between the software packages and improved reporting capabilities.

7.2) Training and professionalism

The initial competency framework and qualifications set a standard, with many SBMs now holding a school business management qualification. They are still valued with many participants in the research indicating they wished to undertake such training in the coming year.

However, as the role has evolved, there is a need for the standards and qualifications to likewise evolve.

The associations, such as NASBM, ASCL and other stakeholders, are leading the way in increasing the profile and professionalism of the role, through the development of the new competency framework, standards, short training courses and national conferences. However, the research reveals that more needs to be done. The role still lacks a clear pathway from entry level and perception outside the school sector remains much lower than within schools (see section 6.4).

The SBMs are committed to supporting the education of young people. There is growing involvement of SBMs in the SLT and in activities which bring them into front facing direct contact with the students – i.e. as equal leaders with their SLT colleagues, running assemblies, whole school duties (playground patrol, learning walks etc.), coaching and mentoring children/young people and writing timetables/curriculum plans. Consequently ASCL has moved to describing

the role as "School Business Leader" to reinforce that this role is integral within educational leadership.

7.3) Associations and local SBM networks

SBMs appear to be a close knit-network as a profession. Three associations represent their needs – NASBM, ASCL and NAHT, with regional groups that enable SBMs to meet, share ideas and best practice.

Publications such as The Voice, Leader magazine, Education Executive and School Business Manager magazine are fundamental in helping SBMs remain informed about changes in the education and regulatory environment. Online services, such as The Key, digital forums and social media platforms, such as twitter also provide insight and support.

A real positive for the profession is the organisations that represent SBM are coming together, particularly in the last two to three years. For example, the development of the competency framework, the standards and the creation of the Foundation for Leadership in Education all involved collaboration. This collaboration needs to continue if the perception and professionalism of the role is to increase further.

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Prepared by:

firedog
RESEARCH

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