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Creaby, Fiona  (2018) Leading School Business: professional growth and confidence in changing times. Research Report. Institute of School Business Leadership (ISBL).

**Publisher:** Institute of School Business Leadership (ISBL)

**Version:** Published Version

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# LEADING SCHOOL BUSINESS

Professional Growth and Confidence in Changing Times

Dr Fiona Creaby

November 2018  
Research Report



Co-developed with:

# ISBL Foreward

This independent report provides welcome evidence-based research into some of the leadership tensions that exist in the sector. It validates many concerns and issues that members have raised with us as their professional institute.

As the institute responsible for the professional development of school business practitioners, we take great interest in the issues addressed in this report, in particular the potential risks associated to attracting and retaining a talented School Business Leader workforce.

For close to a decade (2010 Academies Act) the demands on school business practitioners have grown, in terms of both complexity and workload. Simultaneously, the Government has reduced its investment in school leadership development and withdrawn entirely from funding School Business Leadership (SBL) programmes. ISBL is now occupying that void and recognises the extended knowledge, skills and experience required to operate as an effective school business professional.

We are working closely with training providers and the Department for Education to develop new tailored programmes and career pathways that will provide the professional development required to close the widening skills and knowledge gap.

As the dedicated SBL professional body, it is our responsibility to engage effectively with other sector stakeholder groups and ensure that we confront professional development, recognition and status challenges together.

ISBL continues to campaign for greater professional recognition and leadership parity. This research provides important evidence in support of our arguments. By raising the profile of our professional community, we hope to encourage schools and trusts to invest in the continuing professional development of their business leaders.

As we evolve as an institute, ISBL will continue to demonstrate, through evidence, the positive impact highly skilled school business practitioners have on their institutions. We aim to conduct further research and impact evaluations, publish more case studies; and host thought leadership forums.

# Executive Summary

This white paper reports on research undertaken with school business professionals in the United Kingdom compulsory education sector during 2017 and 2018. With rapid policy reforms in recent times, schools are facing evolving accountabilities in an increasingly school-led and self-improving system. The last two decades have seen an increase in business management requirements in schools, with business professionals playing an increasingly important role in leading business functions and compliance. However, despite an increasingly complex and turbulent policy landscape, there has been limited research on the school business profession and its development in the wake of reform. Therefore, this research explores the tensions and challenges that school business professionals face in practice and the opportunities and possibilities for their professional growth.

Using a mixed-methods design and thematic analysis, the research presented in this paper involved three phases of data collection to gather the opinions of professionals working in business management roles in a variety of school settings in England and Wales. Just under three hundred volunteers from the Institute of School Business Leadership (ISBL) membership population participated in the data collection, which included an online survey, three discussion groups and ten semi-structured interviews. Data were analysed during each phase of the research to inform a holistic thematic analysis and generate key findings and recommendations for stakeholders at various levels, including school business professionals, professional associations and policy-makers.

## Summary of key findings

The key findings suggest that there was a good level of professional confidence present amongst participants along with confidence in their ability to professionally grow in the future. However, this appeared tempered with apprehensions regarding the uncertain and changing nature of the profession in the wake of policy reforms, in addition to the outlook of school colleagues regarding the contribution and value of input from school business professionals.

### Key themes included:

**Professional status:** a lack of recognition, voice and equality

**Reform:** diversification, funding pressures and increasing workload

**Business understanding in schools:** inconsistencies, value and credibility

**Head teachers as crucial allies:** the importance of strong partnerships

**Investing in professional development:** career pathways, role models and networking



Increasing accountabilities and complexity at local levels were raised as key tensions in the context of growing financial pressures and workloads whilst navigating new structures and expectations in an increasingly self-managed and self-improving system. Inequalities in school leadership and a lack of professional status in schools were raised as key challenges to professional growth.

Concerns were raised around the inconsistent appreciation of business, governance and compliance matters in schools by senior leaders and teachers in terms of levels of knowledge, understanding and the subsequent value and inclusion of the school business professional role. This presented various tensions in the way that business expertise is enabled in schools resulting in differing outcomes from accounts of positive impact and enthusiasm for future growth to accounts of considerable frustration, lack of motivation and thoughts of leaving the sector. However, the role of the head teacher appeared as a crucial ally in enabling voice and involvement in decision-making, and strong partnerships were raised as important to future growth.

The impact of vast reforms highlighted the increasing diversity of the profession and presented the need for clarity around career-pathways and professional development. The considerable value of networking across the profession and participating in mentoring and coaching programmes was also highlighted as important strategies to increase professional confidence and influence future development. Furthermore, taking ownership, being assertive and investing in professional development at all levels were also highlighted as increasingly important to future professional growth in changing times.

## Summary of key recommendations

The research highlights the increasing need for individuals, schools, local systems, professional bodies and policy-makers to work together to increase the recognition, status and growth of the profession in schools. As accountabilities and structures increasingly change and local systems adapt, the research also highlights the importance of taking professional ownership of forging the path ahead. Sector-level collaboration and system level advocacy by key stakeholders is important in supporting this drive, in addition to further research exploring the changing nature of the school business profession and the possibilities for its development.

### Key recommendations included:

**Sector level collaboration:** marketing, promotion and support

**System level advocacy:** the work of professional bodies

**Practitioner-level work:** taking ownership as individuals

**Sector research:** succession planning, career pathways, leadership diversity, and comparative studies

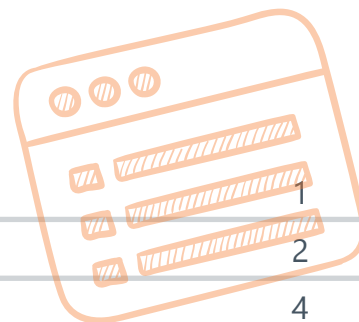


The findings advocate the need for sector-level collaboration and a wide marketing exercise to promote and raise the status of the school business profession alongside promoting the importance of knowledge sharing, networking and leadership equality across school structures. Increasing opportunities for professional networking and peer engagement were also highlighted as important, with recognition that these activities are becoming a core aspect of the profession and should be promoted as an increasingly important vehicle in improving efficiency, innovation and business practices in schools.

For individual practitioners, taking ownership of career development, role-modelling professional values and asserting the need for professional development in various forms, including mentoring and coaching, were strongly advocated as ways in which to increase professional growth and have a greater impact to schools. Furthermore, exploration of leadership diversity, succession planning, career-pathways and inclusive professional development opportunities are strongly advocated to support professional growth.

Overall, this research highlights there is a great need to raise the status of the school business profession. This requires collaborative work at sector-level to align pedagogical leadership, business leadership, and governance in schools to create structures that can enrich and develop schools, and emerging local systems, in holistic and sustainable ways to become agile learning organisations for the future.

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# Preface

In an increasingly complex and turbulent policy landscape, the importance of the school business profession cannot be understated; it is the backbone and foundation of compulsory education in the United Kingdom and is not only a vital aspect of daily school operations but plays a key role in the leadership and improvement of schools in an increasingly school-led and self-improving system.

**Dr. Fiona Creaby (EdD, MSc, FHEA) | November 2018**

## Acknowledgements

Very special thanks are given to the survey respondents, the participants of the discussion groups and to the interviewees for giving their valuable time to support this study.

Thanks are also given to Bethan Cullen (ISBL) for her support and feedback during the research process and also to Stephen Morales (ISBL), Val Andrew (ASCL) and Rebecca Lee (DfE) for their thoughts.

Appreciation is also given to Dr. Paul Armstrong and Dr. Liz Wood for their interest and encouragement in the research and to those attending the research presentation at the British Educational Leadership, Management and Administration Society (BELMAS) conference in 2018, and the National Association of School Business Management (NASBM) national conference in 2017 (NASBM transitioned to the Institute of School Business Leadership on the 20 November 2017).

The research presented in this paper was undertaken by Dr. Fiona Creaby and conducted with the support of the Institute of School Business Leadership (ISBL) via funding and access to their membership population. This paper, and the research underpinning it, were undertaken on an independent basis by Dr. Fiona Creaby and the views expressed herein are the authors'. A summary report of the research is also available.

## About the author



Dr. Fiona Creaby is an academic and researcher at Manchester Metropolitan University and a sector consultant on matters of business management and leadership development in education. As a former school business manager in the English state school system, she has followed the profession from the inside out and actively engages in debates and research at sector level to aid the further growth and development of the profession.



# Section 1: Introduction

This white paper provides an overview of research findings and recommendations from an Institute of School Business Leadership (ISBL) funded study within the compulsory education sector in England and Wales, undertaken independently by Dr Fiona Creaby (Manchester Metropolitan University). Specifically, the research aims to gather the opinions of school business professionals (SBPs) to explore the current tensions and challenges they face, and how this impacts on the possibilities and opportunities for their professional growth in an increasingly complex and turbulent policy landscape.

The research employed a mixed-methods design and involved three key phases of data collection and analysis between July 2017 and May 2018. Using the ISBL membership population as the sampling frame, the research employed a mixed-methods design utilising a survey followed by discussion groups at the ISBL 2017 national conference and semi-structured interviews with ten SBPs from across the sector. Data was thematically analysed to inform key findings and recommendations for stakeholders at various levels, including individual SBPs, schools, professional associations and policy-makers.

This paper begins with an outline of the research context and aim, followed by an overview of the research methodology (Section 2), before moving to present the key research findings and recommendations (Section 3). Subsequent sections of the paper then offer detail on the key findings from each individual phase of the data collection and analysis in sequence: the survey (Section 4); discussion groups (Section 5); and interviews (Section 6). All data presented in this paper is anonymised and pseudonyms are used to protect the identities of research participants. A summary report is also available.

## 1.1 Context

The education landscape in the United Kingdom (UK) is becoming increasingly diverse as rapid policy reforms in England and Wales have brought about the emergence of new school structures, a variety of stakeholders and the decline of local authorities. Increasing structural diversity and growing complexity is placing expectations on schools to self-manage in a time of uncertainty as austerity continues to place financial pressures on schools and local authorities (Rayner, 2017; Hawkins and James, 2017; Keddie, 2016; Courtney, 2015; Woods, 2014).

In an increasing shift towards a 'school-led' system (Armstrong, 2016; Hargreaves, 2012), growing accountabilities for self-improvement, robust compliance, efficient budgeting, resource management, marketing and strategic leadership are increasingly falling to school leaders to negotiate (Armstrong and Ainscow, 2018; Armstrong, 2017; Courtney, 2015; Coldron et al, 2014; Wood, 2014). In the wake of these reforms school business professionals (SBPs) have been highlighted as 'key-players' in the school system (Armstrong, 2016; Woods et al, 2013) tasked with leading and managing a variety of school business functions and operations.

Often traditionally referred to as 'the school business manager', or 'the SBM', the term 'school business professional' or 'school business leader' has been adopted in more recent times by the Institute of School Business Leadership (ISBL), and others (e.g. the Department for Education (DfE, 2017a), to reflect the variety and breadth of responsibilities and accountability levels that business management functions represent in schools.

*...the case of the SBM can be viewed as part of an international movement of professionalisation of the public sector workforce... Reforms to school business management nationally have been rapid and far-reaching and SBMs are often now key*

Woods et al (2013:752)

However, despite acknowledgement of the importance of the SBP role by policy-makers and professional associations there has been limited exploration and research into this role in the UK education sector in recent times (Armstrong, 2017). Indeed, the spotlight has been predominantly placed on the challenges that teachers and teaching-leaders face in practice, often with a focus on how their future development can be supported.

## The evolution of school business management in the UK

Business management in schools, particularly in England, has faced an evolution over the past two decades. Indeed, as Southworth (2010), Woods (2014) and Armstrong (2016) document, considerable work has been undertaken to professionalise the role of the school business manager, with more emphasis on the leadership of school business management in recent times, such as through the work of the Institute of School Business Leadership, formerly NASBM, and the move to institute status (ISBL, 2018a).

As Armstrong (2016) outlines, the historical development of school business management can be predominately traced back to a tradition of Bursarship from the independent school sector. The role saw considerable development in the state school system as a consequence of educational policy reforms in the late 1980s. The 1988 Education Reform Act (HMSO, 1988) and the Local Management of Schools (LMS), through which schools gained greater control and autonomy over their resources, staff and budgets, were particularly instrumental in the growth of business management roles in state schools (Woods, 2014; O'Sullivan et al, 2000). As the role grew steadily through the 1990s, still often associated at that time with the title of 'Bursar', a study into teacher and school leader workload was commissioned (PricewaterhouseCoopers, 2001) during what was perceived in 2001 as a recruitment and retention crisis in education (Armstrong, 2016),

Further work to remodel the school workforce followed in 2003 as a bid to reduce teacher workloads, improve standards and increase job satisfaction (Wood, 2017). This included a significant drive to develop administrative and managerial capacity in schools to support teachers and head teachers in maintaining a greater focus on teaching, learning and curriculum matters (Armstrong, 2016). Hence, business functions such as financial management and the management of human resources and premises were delegated to newly appointed business professionals or those who had been working in administrative roles in schools, such as former school secretaries, who required upskilling as their roles began to grow (Wood, 2017; Woods, 2014).

The Bursar development programme, originally initiated by Estelle Morris the then Secretary of State for Education of the New Labour Government, was launched by the former National College of School Leadership (NCSL/The National College) in 2002 and was an important further step in the evolution of the profession (Southworth, 2010). The programme offered a suite of bespoke school business management professional qualifications and a framework outlining a professional development pathway to school leadership level with a view to professionalise the role of school business manager (Armstrong, 2016). As a part of this professional evolution, the title of 'school business manager' soon became the preference over 'Bursar' along with the programme referred to more commonly as the 'school business management programme' as it was viewed as more representative of the role and its functions (Armstrong, 2016; Southworth, 2010; Wood et al, 2007).

The programme gained momentum during the last decade through funding, scholarships and evaluation reports that highlighted the value that the role of 'school business manager' to schools and raised the profile of the profession (Southworth, 2010; Woods et al. 2010; PricewaterhouseCoopers, 2010; Wood et al, 2007).

Under the banner of 'school business management', the then National Association of School Business Management (NASBM), now ISBL, began developing a competency framework with The National College (NSCL, 2009; DfE, 2014) based around the key functions of the role, such as financial management, facilities management and Human Resources Management. However, as the National College began to decline, in 2014 it announced it had moved away from the design and provision of school business management programmes in line with its purpose to 'create a self-improving, school-led system' (NCTL, 2014: online), with expectations that the programme suite would be run by independent training providers and that scholarship funding would end in 2016.

However, in 2015, NASBM and Chartered Institute of Public Finance and Accountancy (CIPFA) co-developed and published the NASBM Professional Standards Framework (NASBM/CIPFA 2015) with the aim 'to establish a clear blueprint for effective school and academy business management and they celebrate existing best practice' (ISBL, 2018b: online). These standards outlined six key functions of the role alongside with underpinning professional values and behaviours whilst appreciating the diverse range of accountabilities in the sector through a tiered approach to responsibility levels in schools. The standards were adopted by ISBL in transition to institute status in 2017 and in Summer 2018 sector consultation was sought to review the standards and influence their development (ISBL, 2018a).



[Professional standards document](#)


More recently, there has been acknowledgement by current governments in England and Wales as to the impact of SBP roles and their importance to the agenda of raising standards in schools. For example, a written statement in September 2017 by Kirsty Williams, Cabinet Secretary for Education for the Welsh Government stated:

This statement was announced following the allocation of funding in Wales to create more school business manager positions through a 3-year pilot scheme across ten Welsh local authorities. This was then followed by a statement at the ISBL Cardiff Regional Conference in March 2018 with a further speech by Kirsty Williams (Welsh Government, 2018: online) thanking and acknowledging the efforts of school business managers for their 'vital role in reducing head teachers' workload' and freeing up time for teachers to focus on

*'Reducing unnecessary bureaucracy and enabling teachers to spend more time supporting pupils' learning is a priority for this government. ... I support the greater use of School Business Managers as they provide dedicated support for school leaders and teachers, so they can better focus on raising standards in our schools.'*

Kirsty Williams  
(Welsh Government, 2017: online)

A similar picture has occurred in the English context over the last few years, for example with Minister of State for School Standards – The Rt Hon Nick Gibb – speaking at the National Association of School Business Management (NASBM, now ISBL) conference in 2017 explaining that:



*'...the role of the school business manager has never been more important... School business professionals play a vital role in strategic and financial management, which enables more teachers and head teachers time to be given over to teaching a high-quality, knowledge-rich curriculum.'*

The Rt Hon Nick Gibb (DfE, 2017a: online)

The current focus on the profession by policy-makers appears to be growing with some action emerging within particular functions, such as funding, procurement and commercial activity. For example, in England, the Department for Education (DfE) established network engagement roles to support the development of regional SBP networks (DfE, 2018) and have sought to underpin the DfE School's Buying Strategy with school buying hubs supported by the Schools Commercial Team (DfE, 2017b).

Despite growing acknowledgment of the importance of the profession, and emergent action by governments in England and Wales, business professionals have come from facing a 'quiet' revolution (Southworth, 2010) in the last decade to a 'quiet evolution' in recent years as SBP voice remains largely absent from research, literature and scholarly debate. Indeed, as an increasingly vital part of the school workforce, with many SBPs operating at a senior leadership level in schools, there has been little by way of exploration into the impact of policy reforms on the school business professionals compared with their teaching and senior leadership team (SLT) counterparts. Indeed, as Woods et al (2013:763) argue

*'...the complexities of what business management can involve, and what a business manager's role might legitimately include, can be understood very differently by members of the school community. Such matters have excited little attention among education scholars, a state of affairs that we believe should be addressed.'*

Woods et al (2013:763)

Since Woods et al (2013) raised the complexities of business management several years ago, the sector has continued to experience continuing reform that has influenced a divergence to the traditional discourse of 'the school business manager' as a variety of roles emerge, accountability levels increase and an increasing breadth of complex management areas is introduced (Armstrong, 2017; Wood, 2017; Wood, 2015).

*"School business leaders have become accustomed to assisting with the implementation and resourcing of a wide range of government initiatives that directly impact their schools. These policy changes require expertise in new knowledge areas and the development of a new set of skills that include: networking, information gathering, project management, data management and contract management.'*

(Wood, 2017:165)

Historically in the UK context, the 'traditional' school business manager role has been that of a 'generalist' overseeing a variety of functions and operating across a range of different levels depending on their school structure. Many professionals in such roles were more likely to have been in a role for some time that had grown and become more senior over time (Wood, 2017; Woods, 2014). However, as local accountabilities and complexities evolve, generalist roles are becoming broader (Wood, 2017). Furthermore, 'specialist' roles are emerging as new players in the school business professional landscape (Armstrong, 2016) working at various levels in individual schools or at executive levels in Trust settings leading a specific function across a multi-school setting, such as finance or human resources.

In this context, as the school business profession is increasingly operating at multiple levels of accountability in diverse structures, having come from a range of backgrounds, this results in a variety of needs and career-pathways across the profession (Morales, 2018). Indeed, there is much evidence from professional associations (e.g. ISBL, 2018a; NAHT, 2018; ASCL, 2018) and the professional community via SBP articles, blogs and social media (e.g. Dalton, 2015; Jones, 2015) that highlights the challenges and possibilities for the profession in light of this increasing divergence and complexity. For instance, increasing workload is often raised along with a lack of recognition of complexity from across the sector as inequalities in terms of pay, terms and conditions, particularly at school leadership level have been raised (e.g. ASCL, 2017; Hazwell, 2017; Every/NASBM, 2015; Dalton, 2015; Jones, 2015; Andrews, 2015). Indeed, as Wood (2017:168) reflects, after almost three decades of SBP role development 'awareness of their role and contribution is still variable' across the sector, which she argues, along with Woods et al (2013), can create limitations to the broader educational benefits that could be provided by the profession.

As a profession that has seen considerable investment and growth in the last decade, the school business professional community has shown a great appetite for growth despite longstanding barriers around status, recognition and credibility. As Armstrong highlighted in 2016, the sense of 'responsibility' many of his research participants felt was evident as they spoke of 'ensuring the profession survives and thrives going forward' (2016:2). Overall, based on the limited research conducted on the profession within the last five years as highlighted by Armstrong (2017; 2016), Wood (2017) and Woods (2014), this presents the need for increased research in the English and Welsh context to gain greater insights into the challenges facing SBPs, how this influences their growth potential, and the possibilities for increased impact in schools.

## Summary

*'The role of school business leaders has become increasingly complex. It has evolved in a paradoxical turbulent environment in which schools are addressing innovative policy requirements... business leaders have accepted a widening remit and increased their core responsibilities to share the increased workload of the head teacher... linked to an understanding of policy changes and their impact on the learning environment'*

Wood (2017:168)

In recent times, rapid reforms across the education sector have brought about a 'fracturing' of the traditional school business manager role as a more diverse range of roles, responsibilities and specialisms are emerging through shifting accountabilities and the increased variety of local arrangements. This has highlighted many tensions and uncertainties around the evolving nature of the profession and the support professionals need to continually meet new demands placed on them. Yet exploration of the professional challenges, growth and the future potential of SBPs remains extremely limited across the sector (Armstrong, 2017; 2016; Woods, 2014). Thus, research is needed to explore the current challenges faced by school business professionals to better understand how to support, sustain and develop this valuable profession and its future contribution to schools as key-players in the education landscape.

## 1.2 Research Aim

In the turbulent policy landscape of England and Wales, the ways in which schools operate to achieve educational outcomes for children are increasingly complex and diverse. Research and debate have predominantly explored the challenges that educationalists, such as teachers and head teachers, face in their practice as school leaders and how their development can be supported in such rapidly changing times. Limited attention has been given to the impact of such reforms on the professionals who manage and lead school business functions across the education sector. Therefore, this research aims to engage with a range of practitioners from the school business profession to gain insights into the current challenges and possibilities that they face and to explore their concerns and hopes for the future growth of the profession. Hence, the aim of this paper is to present key findings from empirical research and outline recommendations for action and further research which may be helpful to practitioners and other stakeholders across the education sector, including professional bodies and policy-makers.

# Section 2: Research Methodology

## 2.1 Introduction

This section outlines the approach taken to the research and offers an overview of the mixed methods employed. It also outlines the data collection phases and timescales involved and the research sample in terms of the range of research participants involved. Finally, this section offers an overview of the thematic approach taken to the analysis of data and concludes with ethical consideration of the research.

## 2.2 Research Design and Methods

This research is a qualitative inquiry which utilises a mixed-methods design and an iterative approach via phases of data collection and analysis to gather the perceptions, thoughts and opinions of school business professionals to explore their professional confidence and growth in the context of rapid change and uncertainty in the compulsory education sector. A thematic analysis was used to explore the data sets from each phase, as well as all data holistically, to generate overall themes and recommendations.

The research is situated within an interpretivist framework whereby the focus is on gathering perceptions and insights to explore a phenomenon rather than trying to establish a unifying truth to it (Cohen et al, 2011). Furthermore, as the research involves a moderate sample and a wider demographic data set on the SBP population is not available, the intention here is not to generalise the research findings. Rather, the purpose of this research is to generate insight, stimulate debate and suggest recommendations to those within the profession and its wider stakeholders, as well as suggest further areas of research beyond this study. The purpose behind a mixed-methods design was to access as wide a range of practitioners as possible to ask a series of questions via a survey whilst allowing some scope for depth through discussion-based approaches, i.e. discussion groups and interviews. Furthermore, using a phased mixed-methods approach to data collection allowed for opportunity to compare alternative approaches to data collection and for data sets to be generated and analysed through each phase allowing for areas to question, explore and probe to be identified (Denscombe, 2010) and thus allowing each step of data collection to feed into the analysis.

## Data collection methods and schedule

**Phase 1:** The survey and initial data analysis (July – October 2017) 258 respondents

**Phase 2:** Discussion groups and further analysis (November 2017) 26 participants across 3 groups

**Phase 3:** Interviews and further analysis (December 2017 – April 2018) 10 interviewees

**Phase 4:** Overall analysis (May – June 2018)

Recommendations and writing-up (July – Autumn 2018)

At the outset of the research, two research methods were planned (a survey and semi-structured interviews with approximately six to eight SBPs); however, upon asking for volunteers to participate in interviews via the survey, 100 out of 258 respondents volunteered to take part suggesting a great deal of enthusiasm amongst respondents. As it was not possible to achieve 100 interviews in the scope of this research, the interview sample number was increased to ten interviewees, and a further opportunity to gather SBP voice was added via discussion groups held at the NASBM national conference in November 2017.

### 2.3 Sample

#### Sampling frame

In the context and scale of this research, and as there is currently no appropriate medium to collate or access the entire population of school business professionals (SBPs) in the UK, the sampling frame used was the membership population of the Institute of School Business Leadership (ISBL), formerly known as the National Association of School Business Management (NASBM) at the start of the research, at July 2017 which included 2,798 school business professionals.

#### Sample Summary

280 participants, all holding membership or fellowship of ISBL in Summer/Autumn 2017, participated in the research which suggests approximately ten per cent of the ISBL membership population at that time (2,798 members and fellows). The research sample included 258 survey respondents, 26 discussion group participants and 10 interviewees equalling a total of 294 participation events in the data collection across all three phases. However, as two participants indicated their participation in all phases of data collection, and twelve participants indicated taking part in both the survey and discussion group, the research therefore collected the opinions of 280 individual school business professionals. An overview of the entire sample now follows, with the detail of each method's individual research sample found in the corresponding section of this paper (e.g. section 4, 5 and 6).

**Background** Research participants were predominately female and more likely to be over the age of 45 and in their mid-career range at least 15+ years in to working life. A range of in-school experience was present, with most participants having 8 years or more experience in a school setting, with an overall range of less than two years to twenty-five years or more. Participants were predominately degree-level educated with almost a third holding postgraduate qualifications in business-related fields. A quarter of participants held finance qualifications with 13 per cent identifying as qualified accountants (approximately 40 participants in total).

**Roles** A range of role titles appeared, with the most common title being 'school business manager' with many identifying as a 'senior generalist' in an individual school with some working in a similar role at a trust level. Approximately 15 per cent identified as 'senior specialists' in either a school or working at a trust level. Although interviewees and discussion group participants held a slightly broader range of role titles than those indicated by the survey respondents, with several identifying as 'school business manager' or as having a director related title, e.g. 'Director Business and Finance; Director of Resources'.

**Context** There was a broad range of school-types represented, with over a third of participants based in local authority (LA) maintained settings, a third based in a Multi-Academy Trust (MAT) setting and 15 per cent in a Single-Academy setting). The remaining participants were spread across faith school and foundation school settings. Primary education was the most represented phase (37%), with a secondary education setting following at approx. 30% with the remaining participants situated in special schools or other cross-phase settings. School size was variable ranging from under 400 children on roll to over 2000 in some settings, with the majority of participants (80%) reporting their staff size as under 150. School performance outcomes were reported by the majority as positive, however, almost half of the respondents reported a deficit budget or predicted future deficit.

## 2.3 Data Analysis

The research employed a thematic analysis framework and the process of data analysis was iterative, in that attention was paid to the detail of each data set as findings were generated via thematic analysis during each data collection phase, which then recursively informed the next phase (Jones et al, 2014). When data collection and analysis for each phase of the research was completed, the key themes from each data set were considered to construct central themes across all data sets as relevant to the overarching research aims (Denscombe, 2010).

Analysis commenced during data collection as interpretation began upon collation of the survey results in August 2018 (Cohen et al, 2011), which were analysed to establish patterns and variations of responses with content analysis undertaken across open-text question responses to establish themes. An overarching thematic analysis of the survey findings was then undertaken to inform the next two phases of data collection in terms of the areas of questioning and, in the case of the interviewees, the survey also influenced further sampling via representative sample to reflect the breadth of respondents' backgrounds, roles, experience levels and settings.

Discussion group data, captured via research notes, included some verbatim transcription for quotation purposes (with agreement from participants), and provided rich accounts of challenges and opportunities to professional growth. Interview data was captured via audio recording with the permission of interviewees and was rich, deep and vast in nature. Each interview was subjected to a systematic process of repeatedly reviewing the interview recording to generate detailed research notes, including the verbatim transcription of sections from each interview.



The discussion group data and interview data sets were individual thematically analysed, with discussion groups analysis taking place in December 2017 before interviews began and interview analysis taking place between February and April 2018. Multi-level coding was used to establish thematic structures within and between data sets. This included reviewing the notes and transcriptions captured, and in the case of the interviews checking against recordings, to establish key topics of discussion and begin to code relevant sections of transcribed text. The survey findings offered a basic framework to structure this coding from themes generated during survey analysis, however, 'open coding' was also used to establish any new sub-themes presenting (Denscombe, 2010). Data were then further interrogated to establish links and associations between codes to form 'axial codes' (Charmaz, 2000) and begin to construct thematic structures in terms of major themes and sub-themes for each data set. Once data collection and analysis were complete, all thematic findings from data sets were then compared to establish the central themes emerging from the research and to construct overarching findings and recommendations in relation to the research aims.

The time lapse between data collection phases also allowed for analysis of the survey data to undergo a 'member-check' (Creswell, 2013) via conference presentation to approximately three-hundred school business professionals and an article released in the ISBL professional journal 'The Voice' to further explore and validate the findings. A series of professional discussions with sector experts and academics, as well as an academic presentation of overall findings at an education research conference, took place to enable 'peer-debriefing' (Creswell, 2013) and further probe the research findings and validate the analytical framework.

## 2.4 Ethical considerations

The research followed the British Education Research Association (BERA, 2011) ethical guidelines for educational research to uphold the rights and protect the identity of survey respondents and participants of the discussion groups and interviews. All survey respondents were given the context, background and aims of the research survey prior to undertaking the survey and implied consent via submission was outlined in the survey introduction. The discussion group volunteers were informed via a pamphlet in the NASBM conference delegate bag about the scope and aims of the research, their voluntary participation and the use of their data, and confidentiality, which was also reinforced before the discussions commenced. No names or any sensitive personal information were requested during the discussions. The interviewees provided informed consent and were provided with an information pack and ethical consent form to advise of protocols for data security and anonymity via pseudonyms.

## 2.5 Summary

This research employs a mixed-methods study, conducted through three phases of data collection, and a thematic analysis framework to gather the perceptions, thoughts and opinions of a sample of school business professionals and gain insight into the challenges to, and opportunities for, professional confidence and growth in the compulsory education sector in England and Wales.

The next section outlines the key findings, organised thematically, and presents recommendations emerging from data analysis. The remaining sections of this paper offer detail on the findings via an overview of each distinct data collection phase in turn: survey, discussion groups and interviews.

# Section 3: Key findings and recommendations

## 3.1 Introduction

This section brings together the findings from the three phases of data collection (the survey, the discussion groups and the semi-structured interviews) and summarises the overall key findings of the research and presents its recommendations.

The research findings present that there was a good level of professional confidence amongst research participants along with confidence in their ability to professionally grow in the future. However, this appeared tempered with apprehensions regarding the uncertain and changing nature of the School Business Professional (SBP) role in the wake of structural reform, increasing financial pressure, growing workload, shrinking in-school and local authority (LA) support, inequalities in school leadership and a lack of professional status in schools and across the sector. Furthermore, a key tension was the outlook of senior leadership team colleagues and teaching colleagues regarding the current contribution and value of SBP roles, and their potential for the future. There were key tensions in relation to structural reform and use of business functions to improve local arrangements as participants reported various barriers that influenced the impact of their contribution to school decision-making. However, the role of head teachers appeared as a crucially in enabling SBP voice and involvement in decision-making.

## 3.2 Key findings

The research findings were generated from initial thematic analysis of each data set gathered from each data collection method during each phase of the research, and data were then holistically analysed and compared to generate the overall key themes emerging from the research, as below;

- **Professional status:** a lack of recognition, voice and equality
- **Reform:** diversification, funding pressures and increasing workload
- **Business understanding in schools:** inconsistencies, value and credibility
- **Head teachers as crucial allies:** the importance of strong partnerships
- **Investing in professional development:** career pathways, role models and networking



### *Professional Status: a lack of recognition, voice and equality*

Longstanding inequalities in school leadership and a struggle to be seen as equals alongside teaching colleagues often appeared across the data. Underpinning a lack of SBP voice in school leadership, many participants shared experiences of struggling to have input into the leadership of their schools often finding their voice was not taken with equal weight as teaching colleagues or they were not included in key strategic planning. Some reported their efforts to challenge this – often with mixed outcomes – however, many participants shared how their experiences of inequality and a lack of inclusion often resulted in feeling undervalued as they articulated their concerns for the future growth of the profession. These debates also highlighted concerns that SBP levels of pay, terms and conditions do not reflect the growing accountabilities and responsibilities of SBP roles in relation to their teaching colleagues and members of the senior leadership team (SLT). In some cases, these inequalities were influencing retention as several participants shared thoughts around leaving the sector

### *Structural reform: diversification, funding pressures and increasing workload*

Rapid and constant policy reform was highlighted as a key challenge to the profession as accountabilities, complexity, expectations and workloads increase. As participants shared their experiences and concerns around structural reform, shrinking local authority support, increasing workload and growing financial pressures, many felt frustrated with a lack of opportunity to contribute, often because their voice was not seen with equal weight to teaching colleagues. This was a clear tension as many SBPs highlighted their interest, skillset and experience of business functions as useful and valuable to the improvement of local structural arrangements yet felt there was often a lack of opportunity to have input. The multi-academy trust agenda in England was often raised in this context, presenting mixed views on the impact of MATs to the growth of the profession. Some participants felt there were opportunities for growth as new structures emerge, however, shared challenges of working in a multi-academy trust and uncertainty around their future security and growth in such structures.

There was also considerable debate around the generalist role and whether to specialise as a way to protect job roles as many reported experiences or fears around redundancies in their local areas due to funding cuts and perceived the centralisation of business services across MATs as a 'cost-cutting' exercise. However, there were reports to the contrary, although this was not common across the data, there were SBPs who reported positive experiences and increased opportunities to develop. The increasing complexity of financial management was also raised by participants, with many highlighting the additional time and worry spent on budgeting and managing conflicting priorities and competing expectations. Many participants felt that the breadth of their role was increasing as accountabilities at school-level grow and policy reforms bring new challenges.

### *Business understanding in schools: inconsistencies, value and credibility*

Research participants shared a strong concern around inconsistencies in the level of knowledge and understanding of business functions, governance and compliance in schools by senior leaders and teachers, and their subsequent value of SBP role and its contribution. Matters of business planning, strategic leadership, budgeting and financial management, in addition to robust governance, were raised as often lacking in their settings by the majority of teachers and by many senior leaders. This was a key tension in matters of structural reform and the management of change in local settings and was often linked back to the lack of status of the profession as barrier that is undermining the weight of SBP voice in schools and its growth for the future. As a key frustration, many participants were concerned that their expertise was underutilised, ignored or not taken seriously, particularly when school leaders were making decisions around matters of compliance, infrastructure, finance and staffing without appropriate knowledge or understanding.

### *Head teachers as crucial allies: the importance of strong partnerships*

The role of the head teacher was consistently highlighted as crucial in enabling SBP voice and involvement in decision-making in schools. Where participants highlighted their ability to have impact and reported feeling included and valued in decision-making, they commented on a forward-thinking and supportive head teacher or principal who understood the SBP role and its contribution to the school and the sector. Conversely, those that spoke of feeling undervalued, frustrated and lacking in ability to have voice or impact spoke of working in settings where the contribution of school business leadership was not fully understood or supported across the SLT, and in some cases not supported by the head teacher. This was often linked back to a lack of understanding of the school business function, a lack of recognition of expertise and a lack of equality in voice across the sector. Overall, a 'head teacher: SBP alliance' was felt to be crucial in enabling SBP contribution and impact with strong partnerships vital to the growth of the profession

### *Investing in professional development: career pathways, role models and networking*

As feelings of uncertainty about the future often surfaced, participants spoke of career-pathways becoming vague in relation to the tension of whether to specialise or not, with concerns around redundancies, succession planning and inclusive CPD opportunities shared, including concerns around the transferability of qualifications across the sector. However, participants indicated considerable passion for the work that they do and how they often found confidence through seeing the outcomes of their work in school and through networking with peers. The SBP role was highlighted as an isolated role in schools with a need for peer to peer support, with the findings situating the activity of knowledge-sharing through collaboration and support across the SBP community as an important core activity. Furthermore, many SBPs advocated the importance of individuals within the profession taking ownership of their career development and the need for all SBPs to take time for professional development in various forms – including networking and mentoring – through engagement with their peers and local networks. Finally, role models, mentors and coaching schemes were felt to be important to motivate, inspire and encourage professionals to develop, with ISBL fellowship highlight as having a key part to play in the development of the profession going forward with more attention needed to succession planning and career-pathways at all levels.

### 3.3 Implications of the findings

As the state school sector faces increasing structural diversity, financial turbulence and uncertainty through changes to local government arrangements and national policy reforms, the research findings underpin a pressing need to promote the importance of business leadership across the sector. Indeed, the research findings suggest an overarching theme around how structural reform and policy initiatives are placing more emphasis on schools as holistic self-managing learning organisations with increasing need and accountability for strategic leadership and robust governance.

Therefore, it appears increasingly necessary to promote the current and potential impact of business leadership in the state school system as a key aspect of ensuring the future sustainability and growth of education organisations and local systems. The research findings present how SBPs have strong professional confidence and great potential to provide strategic input and direction highlighting the increasing need to enable and empower SBP as senior leaders alongside head teachers to ensure that schools can sustain and develop educational improvement.

### 3.4 Recommendations

The findings illuminate the need for a wide marketing exercise across the sector to promote and raise the status of the school business profession alongside promoting the importance of knowledge sharing, networking, equality across in-school leadership structures, and exploration of succession planning and inclusive CPD opportunities. Further, the findings strongly advocate for school governing bodies and line-managers to encourage and support individual school business professionals with networking and peer engagement. These activities are increasingly recognised as a core aspect of school business professionalism work and as helpful vehicles to improve opportunities for efficiency and business practices at all levels, for the benefit of schools.

The findings also highlight the need for individual SBPs to play an active role to enable knowledge-sharing by promoting and asserting their need for the time and resources to engage with their peers and local networks, as a requirement of their role. Furthermore, taking ownership of career development and asserting the need to take time for professional development in various forms – including networking and mentoring – were strongly found to be a crucial way to increase the potential for SBPs to develop and have a greater impact in-school.

To attend to an apparent inconsistency in understanding around matters of governance and business leadership in schools, and to enable the growth of the profession and increase its potential to impact on schools, this research also highlights the need for a wide marketing exercise through sector-level collaboration and research to promote and raise the status of the school business profession. Furthermore, promoting the importance of joint knowledge-sharing events and professional networking as a central part of SBP roles and a benefit to schools is also greatly needed, alongside an exploration of career pathways and succession planning. Additionally, there is a need to advocate for greater equality in school leadership structures, along with more inclusive CPD opportunities and events across the sector.


Overall, the findings highlight the increasing need for individuals, schools, local systems, professional bodies and policy-makers to work together to increase the recognition, status and growth of the profession in schools. As accountabilities and structures increasingly change and local systems adapt, the findings also highlight the importance of taking professional ownership of forging the path ahead. Sector-level level collaboration and system level advocacy by key stakeholders is important in supporting this drive, in addition to further research exploring the changing nature of the school business profession and the possibilities for its development.

The key recommendations include:

- **Sector level collaboration:** marketing, promotion and support
- **system level advocacy:** the work of professional bodies
- **practitioner-level work:** taking ownership as individuals
- **Sector research:** succession planning, career pathways, leadership diversity, and comparative studies

### Sector-level collaboration

Although many research participants acknowledged the increasing collaborative work by professional bodies across the sector, and the work with policy-makers, it was felt more was needed, particularly in terms of marketing and promoting the role to aid in raising the status of the profession. However, to successfully showcase and promote the role and strong partnership across the sector, for example between SBPs and head teachers, it was felt that case studies of good practice and impact studies of SBP contribution would be helpful. Hence, to support wider marketing and promotion of the profession, it would be helpful for stakeholders, such as professional bodies across the sector and the DfE to:

- 
- Establish a project to gather case studies of good practice in business leadership (especially along the themes of MAT formation, business services and centralisation, and collaborative partnerships) and promote these through professional body
  - Undertake an SBP Impact study, featuring individual case studies that showcase the in-school impact of SBPs and promote these via the DfE and professional body partnerships
  - Develop a collaborative advocacy 'steering' group/project with a goal to facilitate and promote the alliance of SBPs and head teachers and showcase the impact of strong partnerships on schools
  - Develop and undertake a collaborative marketing and promotion exercise, locally and nationally, with dissemination by regional groups, professional bodies and the DfE, featuring various resources constructed across the sector to include publications, activities and events that promote, facilitate and showcase:
    - case studies of good practice in business leadership
    - SBP impact studies across all school types
    - the importance of SBP – head teacher alliances
    - role models, mentors and the importance of professional membership/fellowship

## System-level advocacy: the work of Professional Bodies

Many participants acknowledged the work of professional bodies on promoting and professionalising the work of SBPs, including the development of NASBM to institute status as ISBL in 2017. Furthermore, growing collaborations between professional bodies and advocacy at sector-level was acknowledged as a helpful way forward with many participants citing the need for this work to increase. Based on the research findings presenting the lack of status of the profession to be one of the biggest challenges due to the profession, work to influence the perception and level of equality in school structures is greatly needed and increased advocacy work is seen as vital to sustaining and growing the profession.

With many SBPs reporting their lack of status and sharing frustrations around inequalities, not only in their terms, conditions and pay, many participants from outside of education having served at senior levels in many different types of organisations reported their shock at not being taken seriously by other school staff. Many participants indicated continuing frustrations at finding that their input was not equally valued in-school despite their experience, background and qualifications. Furthermore, as an isolated role in schools, the importance of networking and knowledge-sharing, along with its impact in school, was increasingly highlighted as a vital core aspect of the work of SBPs.

### Therefore, the following work by professional bodies is suggested:

- Advocacy for SBP networking as a core function of the role recommending that schools support their SBPs to become part of local/regional groups, attend vital events and engage in peer-platforms to share knowledge
- Continue and increase professional body collaboration between SBP, teaching and governor bodies and the DfE and support and promote joint knowledge-events and CPD
- Promote SBP networking and knowledge-sharing platforms collaboratively at a national and local level, sharing the impact of this learning via case studies
- Advocate for a national feasibility study into a single pay scale for all school staff
- Advocate for a national explorative study into school leadership equality and diversity, including senior leadership accountabilities, responsibilities, pay and conditions; this could be a collaborative exercise by professional bodies

### Practitioner-level work: taking ownership as individuals

To increase impact in school, develop further career potential and play a part in growing the profession, suggestions to individual SBPs include taking ownership of career development and being assertive in-school around the need for networking and knowledge-sharing as a central aspect of SBP roles, for example:

Join local and/or regional networks and engage with peers, asserting the need for time for this activity as a core aspect of the SBP role; if there is not an accessible platform locally, seek to create, lead or develop a local group

Take part in knowledge-sharing, engage with 'knowledge events', such as local debates, forums, meetings, conferences and information sessions, whether this is in-person or via social media platforms/web-based engagement

Subscribe to professional literatures or blogs to remain abreast of sector developments and develop the opportunity for wider access to peer support

Join and take an active role in a professional body that represents, advocates and furthers the interests of the school business profession; seek to engage with opportunities to have input to consultations and research to shape and influence the growth of the profession in the sector

Find a mentor and/or consider becoming one to others

Role-model the SBP professional values and encourage the development of colleagues at all levels

Furthermore, recommendations to individual SBP to raise their own profile in school and promote awareness of their knowledge, experience and ability to contribute in different ways to colleagues could include:

Seek out opportunities to join, advise, contribute, or observe SLT and governor's meetings or curriculum meetings; expressing interest in contribution and highlighting knowledge and experience to colleagues

Role-model the school business professional values and seek opportunities to promote the impact of SBP work across the school, to the SLT and governors and across SBP networks

Seek to build and develop a strong alliance with SLT, especially the head teacher, asserting and advocating the importance of business leadership in school decision-making

Seek to build a strong relationship with key Governors/Trustees

Act as a critical friend to all colleagues to develop and challenge thinking and raise awareness of the business impact of decision-making in school and the potential of effective business leadership to sustain and improve student opportunities



## Sector-level research

Although many interesting avenues of exploration have been highlighted in this research, the key recommendations for further research include:

- Succession planning and career-pathways
- Exploration of leadership diversity
- Comparative studies from other public sector institutions


### *Succession planning and career-pathways*

Due to the increasing divergence of the profession, with specialists, generalists and those new to the profession from other sectors increasing, collating and evaluating the current demographic of the profession and the variety of background of those within it would be helpful in assessing how to support a variety of career-pathways and provide a diverse range of support mechanism, entry-points and guidance. This is suggested to include:

- Collate a baseline: undertake a national demographic study to formally assess the current diversity of the profession to determine existing levels of experience, skills and background, including a collation of routes into the profession, and evaluate the appetite and potential of current SBPs to develop
- Explore and evaluate the talent base: utilise findings from the proposed demographic study, and conduct further empirical research to consider the current and potential talent pipeline and evaluate options for career-entry and pathways
- Consider undertaking comparative studies of talent development and leadership development in other public sector institutions to explore impact and lesson learned. For example, exploring the graduate management training scheme from the NHS Leadership Academy

### *Exploration of leadership diversity*

As many issues around professional recognition, status and credibility were raised inequalities in school leadership were illuminated in relation to how the input and contribution of business professionals is valued in schools. As accountabilities at local level and increasing expectations to self-manage and lead matters of business, compliance and governance in schools, this raises the spotlight on the diversity of leadership in schools in terms of the range of perspective, experience, knowledge and training present on school leadership teams and executive teams in multi-school settings. This is an important area of exploration and it is suggested that it would be beneficial to consider the following:

- 
- Undertake a desk-top study of current research into leadership arrangements, roles, accountability structures and decision-making power in various settings, particularly large settings and executive level e.g. MATs and academy chains, federations, clusters
  - Use the findings from the proposed desk-top study to inform the design of empirical research to explore the knowledge, skills and experience-levels required to holistically lead, sustain and develop a 21st century learning organisation to better understand and evaluate how school business professionals can contribute.
  - Evaluate school leadership development opportunities: explore formal NPQ leadership qualifications for opportunities to widen inclusion and include more emphasis on governance and business leadership.

### Comparative studies

Undertaking a set of comparative studies of good practice in business leadership and management in other public sector institutions is recommended. Although schools are unique and variable contexts, it is recommended that consideration is given to conducting comparative studies to explore impact and lessons learned. This might include exploring good practice in various areas, such as: risk management and governance; strategic financial management; leading large-scale structural development; leading people through change; approaches to developing organisational identity and culture; leadership development.

### 3.5 Summary

The research suggests an overarching theme around how policy and structural reform are placing more emphasis on schools as holistic self-managing learning organisations with increasing accountability for strategic leadership, business management and robust governance.

However, this was alongside a theme of growing concern amongst participants around the lack of understanding and importance given to the governance and business aspects of organisational management and leadership, both in-school and at system level. Concerns around the knowledge and skills gap of teacher-leaders in schools and the structures of power and accountability were highlighted as key barriers to having voice and input into vital aspects of organisational governance, compliance, growth and sustainability.

Overall, there is a great need to raise the status of the school business profession. This requires collaborative work at sector-level to align pedagogical leadership, business leadership, and governance in schools to create structures that can enrich and develop schools and emerging local systems in holistic and sustainable ways and become agile learning organisations for the future.

# Section 4: Survey findings

## 4.1 Introduction

This section offers an overview of the findings from the survey issued to the membership population of the National Association of School Business Management (NASBM) in Summer 2017. It presents an overview of responses from each section of the survey (as detailed in Table 1) outlining the key themes from the analysis of survey data. A list of survey questions/charts and can be found at appendix 3.

## The Survey

The survey was issued to the entire NASBM membership population via email in July 2017 (now ISBL), which at that time consisted of 2,798 members and fellows. 258 responses were received presenting a 9.2% response rate. The survey began by outlining the aims and purpose of the research and how the data would be used. It was split into four main sections as below:

Table 1: Overview of the survey questions

### SECTION A: Respondents' background

This first section presented multiple-choice questions asking respondents about their gender, age, the qualifications they held, length of service in a school/education setting and length of experience in business management related roles across their whole careers. Respondents were also asked what sectors they had experience of working within, outside of their current setting.

### SECTION B: Current professional role and setting

The section presented multiple choice questions asking the respondents to indicate the type of school they work in, the phase of education of the school, approximate pupil numbers on roll and the number of staff employed. It also asked for the school's most recent performance judgement (e.g. Ofsted) and its current and predicted budget position (deficit = yes or no or heading towards). Respondents were also asked to select a role title that closely represents theirs and to indicate how their role is focused (e.g. generalist/specialist at school level or Trust level, if applicable). They were also asked how long they had been in their current post, how many staff directly report to them and how many staff they have overall responsibility for. Respondents were also asked about their participation in meetings with senior staff and governor/trustee meetings.

### SECTION C: Perceptions of professional growth and confidence

Using 'Likert' scales, respondents were asked to rate the extent to which they agree or disagree with statements grouped around five specific areas of questioning, including: inclusion in decision-making and the understanding of their role in school by others; the recognition of their role in school by others and their engagement in self-promotion; their feelings around role-security and their work capacity; their involvement in, and attitude to, managing-change in their schools; their capability and role development in terms of training, knowledge and levels of confidence. The Likert scale options were: strongly agree, agree, neutral, disagree, strongly disagree. A list of all statements for section C can be found at Appendix 3.

## SECTION D: Final thoughts on professional role

In this last section, respondents were asked two multiple choice questions around how they felt their role was perceived by the SLT in their schools, as well as how much they felt their role has changed in specific ways in the last few years. The final questions in this section were open ended as follows:

- What one aspect of your role causes you the most concern/stress?
- Is there anything else you would like to share about how you feel in relation to your professional confidence and growth as a school business professional?
- Any other comments you might have about what you feel should be the priorities for NASBM as we become the Institute of School Business Leadership (ISBL) later this year.

### 4.2 Survey analysis

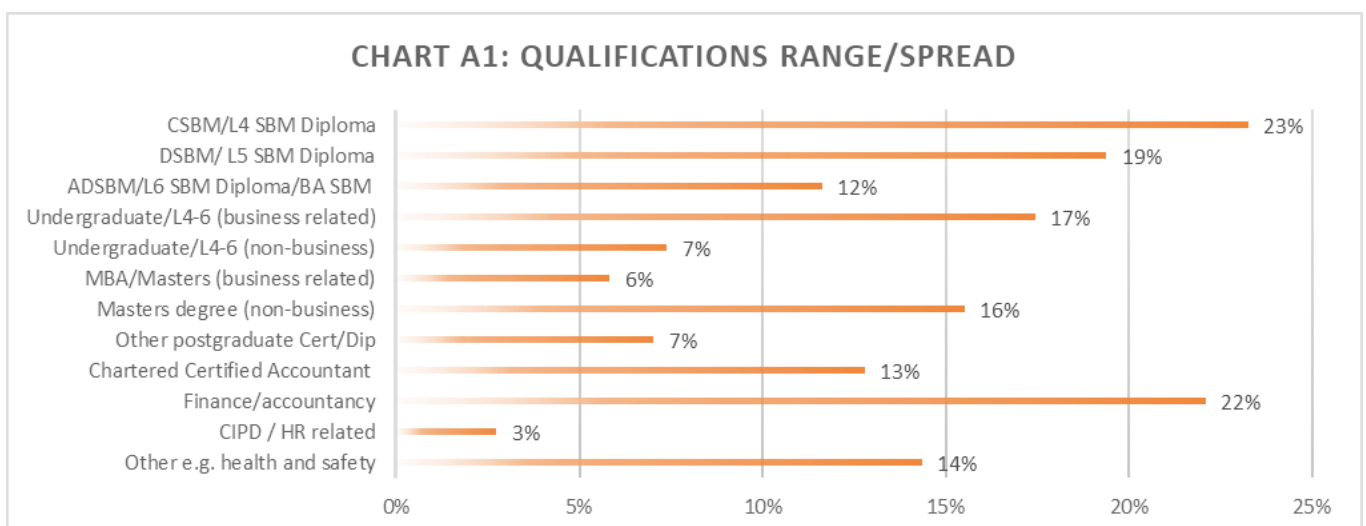
The analysis of the survey data is presented here in relation to each section of the survey (as detailed by Table 1 in section 4.1). The analysis of section A and B of the survey highlights respondents' answers to multiple choice questions about themselves and their settings (a full set of questions/charts for sections A and B can be found at appendix 3). The analysis of section C focuses on key patterns and themes emerging from attitudinal responses to statements related to the areas of questioning shown in each chart title (a list of the statements presented in each area of questioning is found at appendix 4). The analysis of section D presents the responses to the two final multiple-choice questions and offers a thematic overview of key findings from the open-text responses to the open-ended questions. The numerical values of responses (%) shown in each chart in this section for each variable are rounded to the nearest percentage.

#### Analysis of Section A (respondents' background)

Section A asked questions about respondents' backgrounds, qualifications and career experience. From the 258 survey respondents, most respondents identified as female (79 per cent) and were aged forty-five years or more (74 per cent).

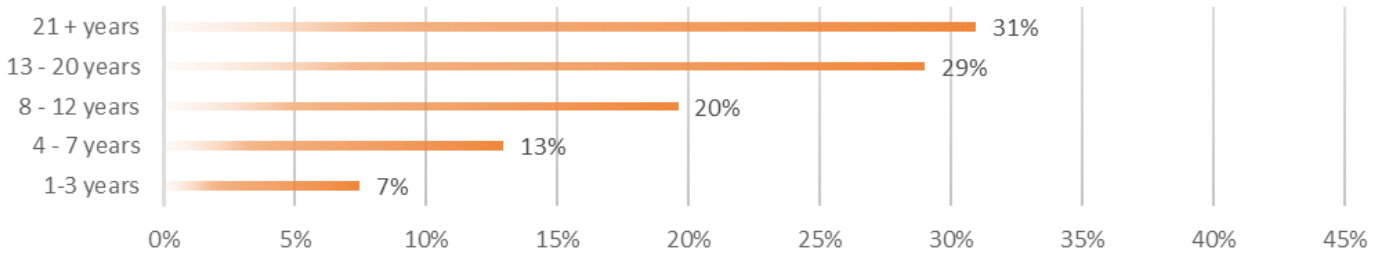
Respondents held a range of qualifications across various disciplines (business related and non-business) at different levels. Almost all respondents indicated holding a degree-level qualification or equivalent, or other level 4, 5 or 6 qualifications. Just over half of the respondents indicated holding one or more of the bespoke school business management qualifications (e.g. CSBM, DSBM, ADSBM). Approximately 29 per cent indicated being educated to a postgraduate level, such as Master's degrees, Level 7 certificates or diplomas with 6 per cent indicating holding an MBA. A further 22 per cent held financial qualifications, such as CIPFA certificates or accounting technician qualifications (AAT), with 13 per cent identifying as chartered certified accountants. Other qualifications, such as health and safety, project management, procurement, educational studies, law and banking were also indicated by approximately a third of respondents.

CHART A1: QUALIFICATIONS RANGE/SPREAD

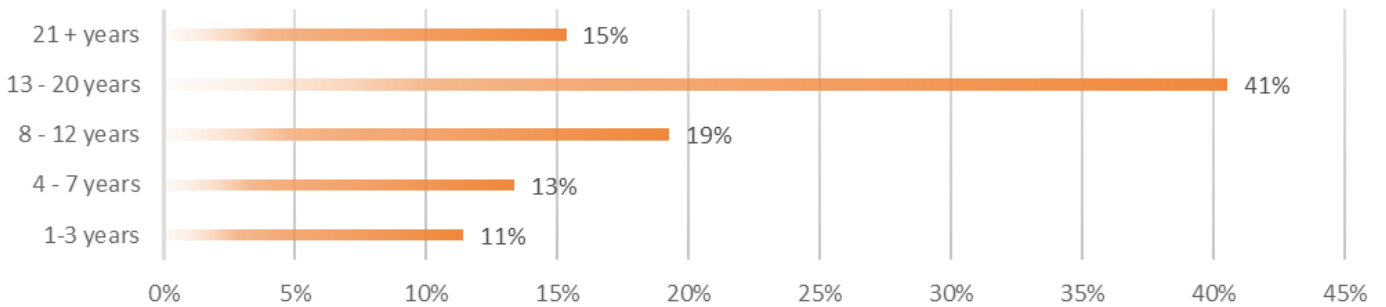


As charts A2 presents, respondents were predominantly experienced business professionals who were primarily in their mid-to-late career (60 per cent), with more than 13 years of career experience in business management or related roles (60 per cent) with 31 per cent indicating 21+ years career-experience. When asked how many years of experience they had in a school setting (chart A3), 75 per cent of respondents indicated eight years of experience or more with 41 per cent respondents presenting with thirteen to twenty years of experience (41 per cent). Many respondents were more likely to have entered the compulsory education sector from accountancy, banking or financial services settings or a local government/public sector backgrounds (83 per cent).

**CHART A2: EXPERIENCE IN BUSINESS MANAGEMENT ROLES (ACROSS WHOLE CAREER)**



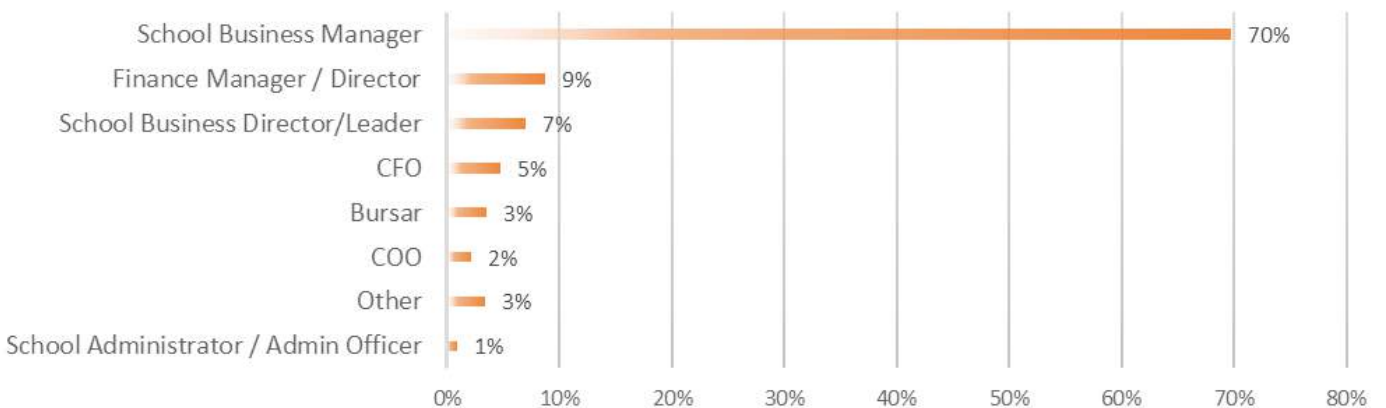
**CHART A3: EXPERIENCE IN A SCHOOL SETTING**



**Analysis of Section B (respondents' current context and role)**

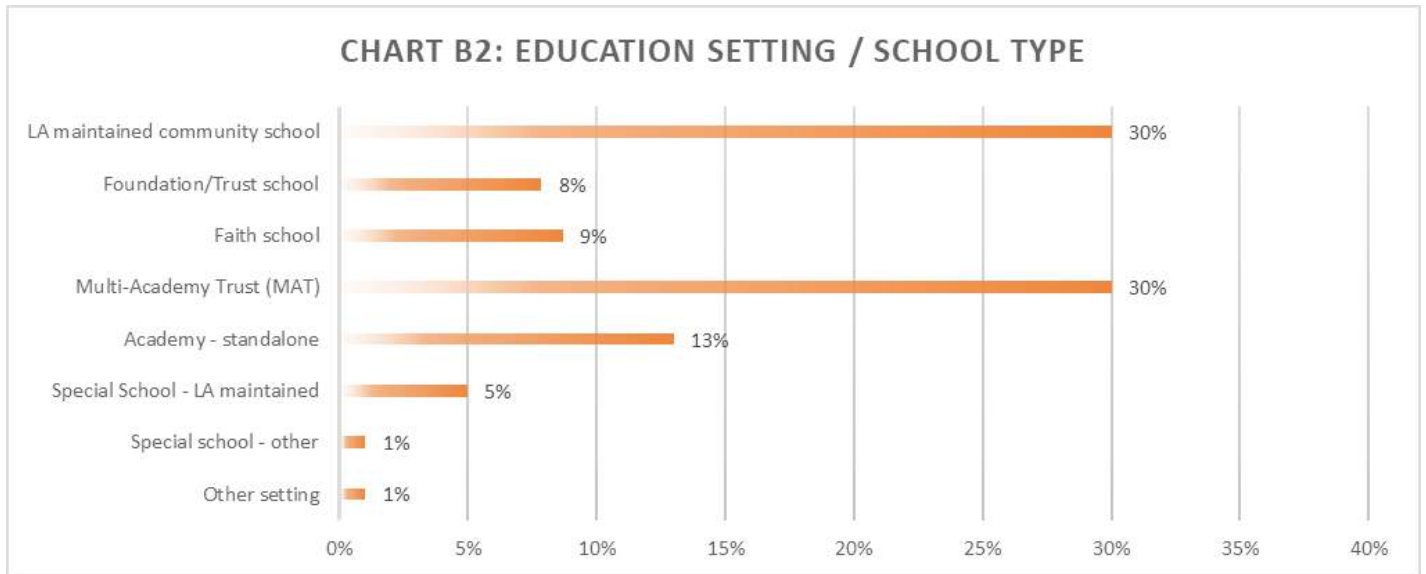
or' (9 per cent) and 'Chief Financial Officer' (5 per cent) as the next most commonly selected titles, as shown in chart B1. Respondents each held a range of role titles, with 'school business manager' (70 per cent) appearing as predominant title, with 'Finance Manager / Director' (9 per cent) and 'Chief Financial Officer' (5 per cent) as the next most commonly selected titles, as shown in chart B1.

**CHART B1: ROLE/JOB TITLE**

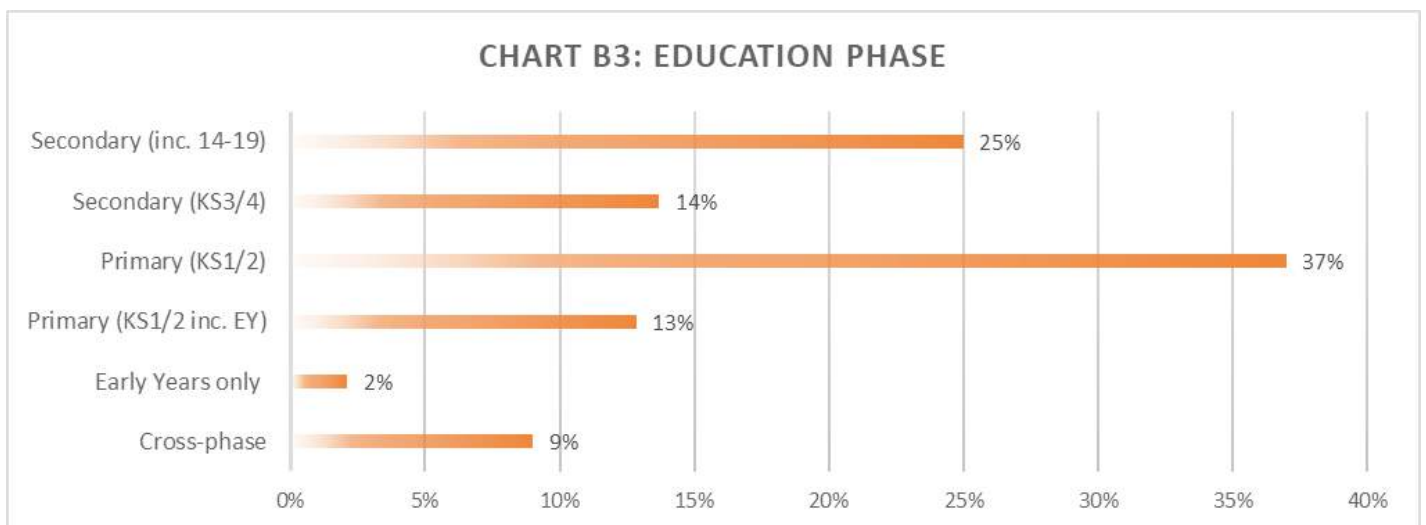


In terms of their role focus, 83 per cent of respondents identified as a 'senior generalist', either in an individual school (75 per cent) or a multi-academy trust (7 per cent). The remaining respondents identified as specialists either in an individual school (7 per cent) or at trust level (7 per cent). 96 per cent of respondents indicating line-managing staff with the average being 10 direct-reports but ranged from 2 to 65.

As chart B2 presents, respondents were spread across school settings, with many based in either a Local Authority (LA) maintained school (35 per cent) or a single academy trust / multi-academy trust (43 per cent).

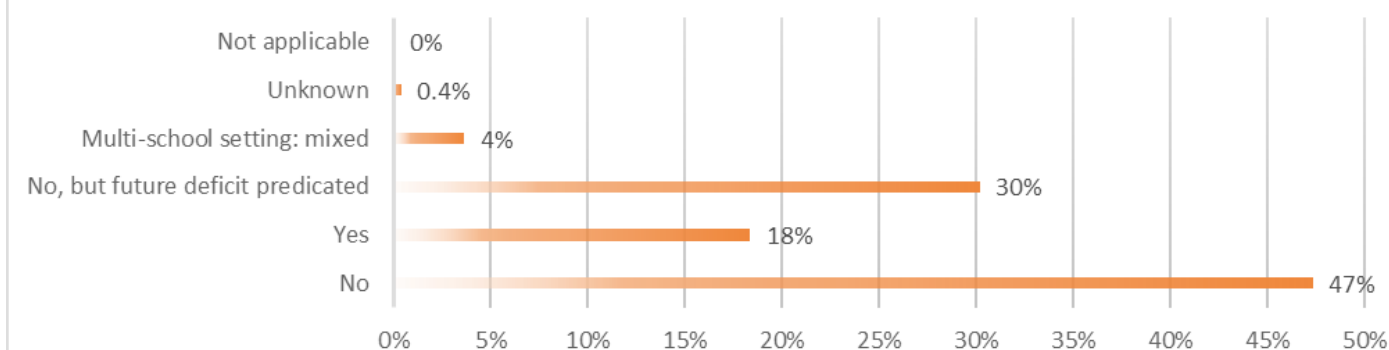


The most common phases were primary education (37 per cent) and secondary education inclusive of 14-19 provision (25 per cent), with 25 per cent of all respondents reporting the inclusion of early years provision in their setting, as shown by chart B3. The number of pupils on roll (NOR) in respondents' schools was more likely to be under 1000 (72 per cent) with 27 per cent reporting their NOR as over 1000 and 35 per cent reporting it as under 400. The number of staff employed in the respondents' setting was more likely to be under 150 (77 per cent), with 32 per cent of respondents indicating between 51 and 99 staff are employed..



When indicating the most recent school performance outcome/judgement, 88 per cent indicating positive judgements and outcomes in their setting – for example Ofsted Grade 2 – Good (66 per cent) or Ofsted Grade 1 – Outstanding (22 per cent). Of the thirteen that did not answer, two respondents offered comments about Estyn outcomes. When asked about the budget position in their schools (chart B4), the overall position indicated by most respondents were that they were not currently managing a deficit budget (77 per cent), however, when considering future prediction (30 per cent), this suggests almost half of respondents are facing increasing financial pressure and would likely be managing a deficit budget within the next few academic years. The comments from the open-ended questions regarding concerns and stressor indicated much concern over reducing funding and increasing financial pressures with many respondents worrying about how to balance their budgets or facing deficit situations in the next one to three academic years.

**CHART B4: IS YOUR SCHOOL MANAGING A DEFICIT BUDGET?**



Most respondents had some inclusion at board level, with a mixture of participation patterns present. The most common scenario appeared to be attendance at committee meetings deemed relevant, such as finance, premises management or health and safety (93 per cent). However, full board level attendance dropped to 64 per cent. Overall, 96 per cent of respondents indicated that they participated at least monthly in meetings with the most senior staff in their settings. However, as analysis of section D found, there were many tensions in how their contribution is received and valued by senior colleagues.

### Analysis of Section C (perceptions of professional growth and confidence)

In this section of the survey, respondents were asked to rate how much they agreed with a series of statements related to five key areas:

- decision-making and the understanding of their role in school;
- recognition of their role in school and self-promotion;
- their role-security and capacity;
- their involvement in, and attitude to, managing-change;
- role development and capability in terms of training, knowledge and levels of confidence in abilities.

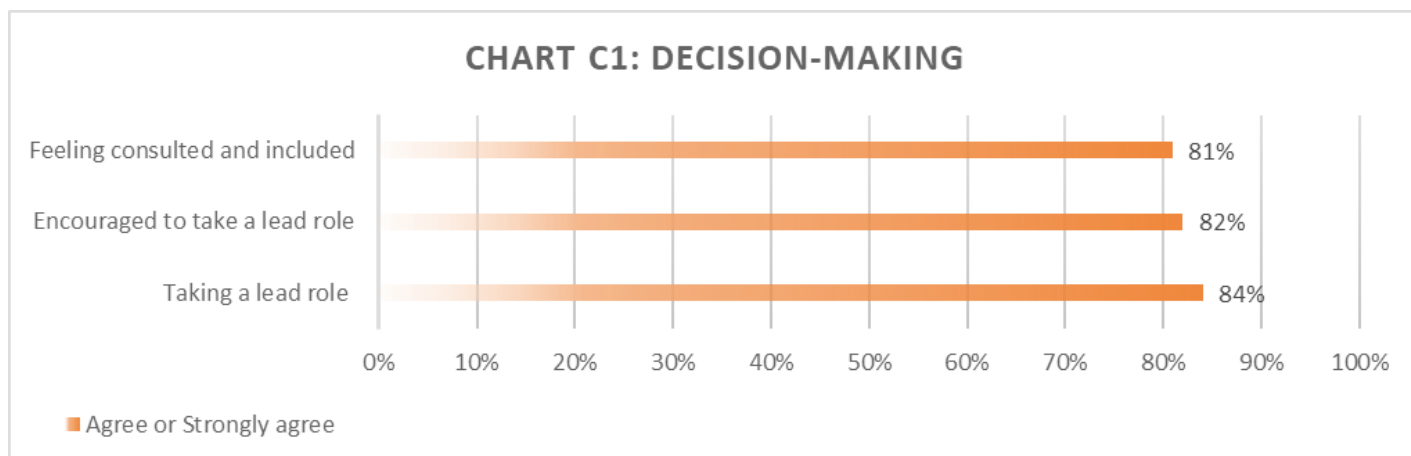
The answer options on the Likert scale consisted of:

- strongly agree
- agree
- neutral
- disagree
- strongly disagree

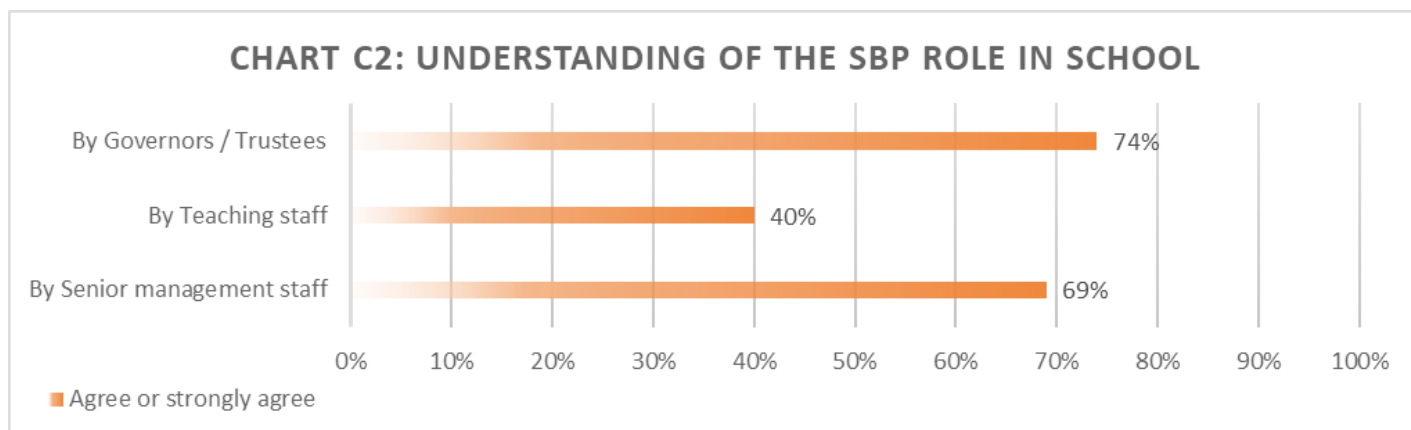
The data presented below focuses on the key themes found during analysis and predominantly presents the number of respondents who agree or strongly agreed to the statements (as shown in each chart). However, in some questions where there were tensions emerging in the data, how many disagreed or felt neutral about a statement is also presented.

## Decision-making and role understanding

Respondents were presented with a series of statements around inclusion in decision-making and how they felt their role was understood across the school community. Most respondents agreed or strongly agreed that they took a lead role in decision-making in all or most business functions in their setting, with many also indicating that they feel encouraged to do so (chart C1).



The majority also agreed that their role was understood by senior management staff (69 per cent) and governors/trustees (74 per cent), with less (40 per cent) agreeing that this was the case with teaching staff (as shown in chart C2).

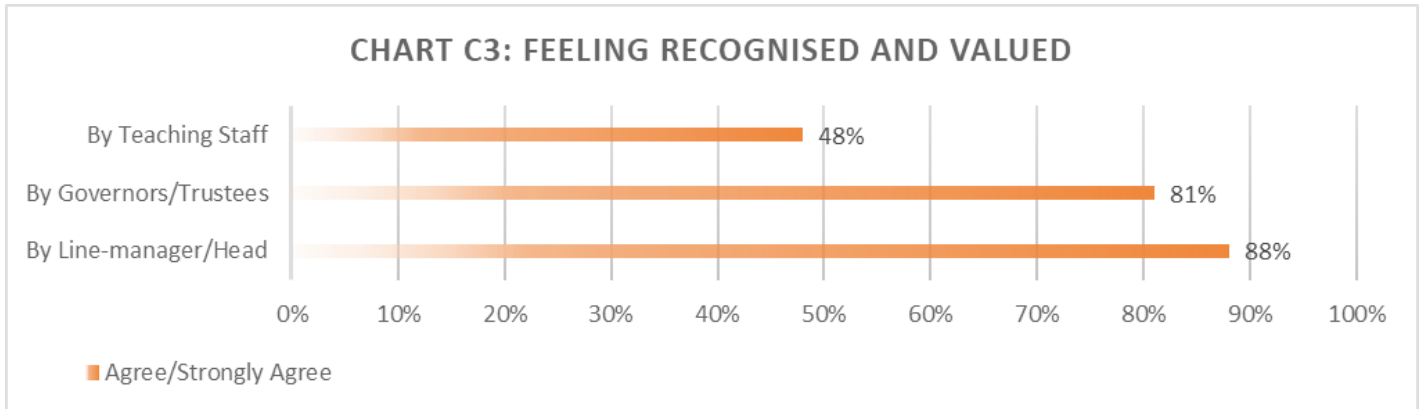


However, the analysis of open-ended questions revealed that many respondents, including those who indicated that their role was understood by others in their school community, shared concerns around the level of understanding of their role by the wider senior leadership team (SLT), and in several cases, of head teachers, and the level to which their input was received and valued by their colleagues (see section D for examples). Therefore, the findings around role understanding presented a conflicting view around how respondents indicated the perception of their role by the senior leadership team. Analysis of Section D will explore this further.

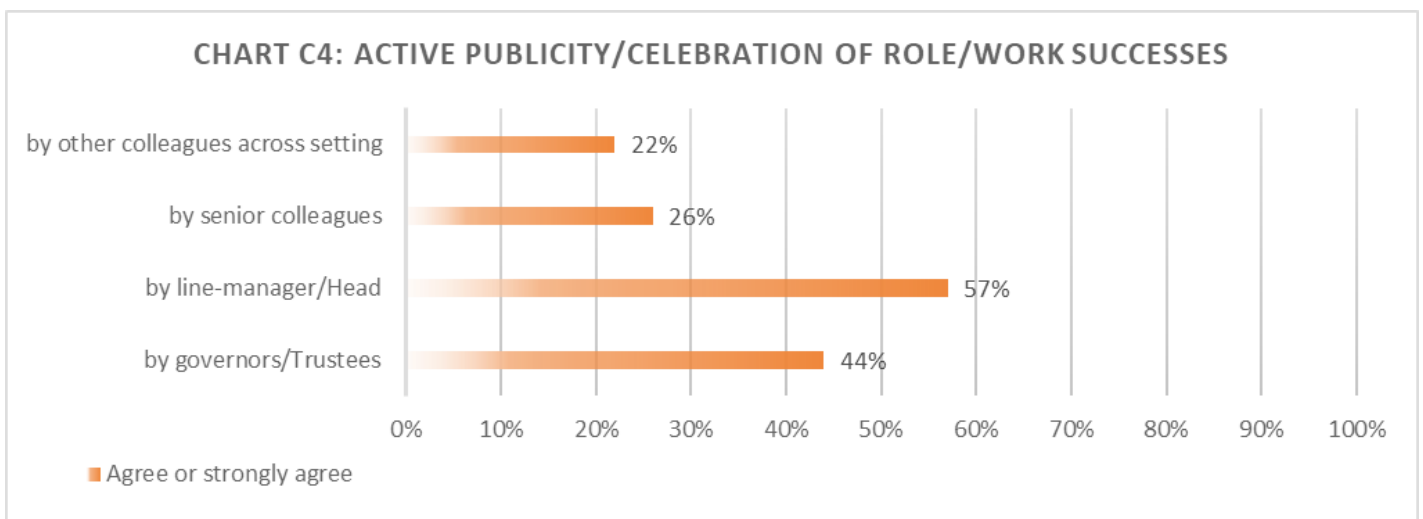


## Recognition and self-promotion

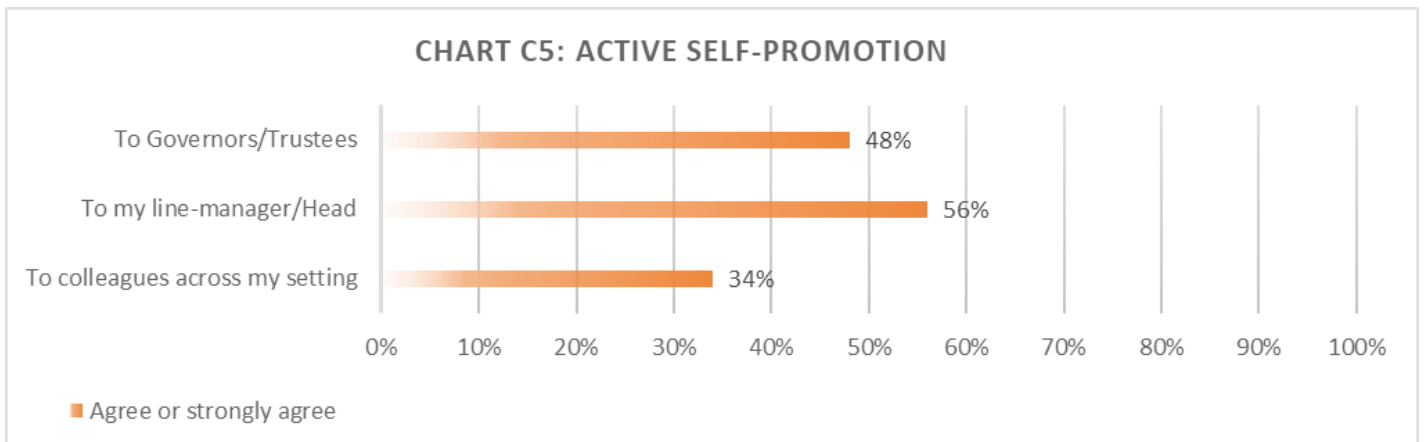
As chart C3 presents, many respondents felt recognised and valued for their professional contributions by their line-manager/head teacher, and in relation to governors/trustees. However, only 48 per cent felt that teaching staff understood their roles. The option to select 'senior leadership team (SLT)' was not present in this section, however, as section D will explore, there were comments around a lack of recognition of respondents' expertise from SLT members.



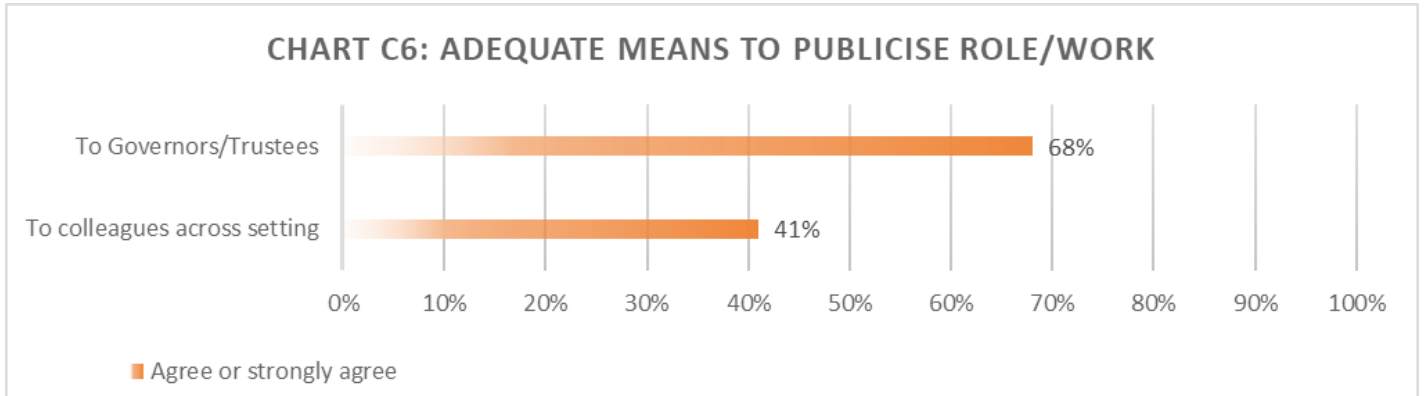
Respondents were also presented with statements as to how much they felt various stakeholders in their school actively publicised and celebrated their role and work successes across the wider school community. As chart C4 presents, respondents indicated more active promotion by their line-manager/Head (57 per cent) and governors/trustees (44 per cent) compared with senior colleagues (26 per cent) and other colleagues across their setting (22 per cent). The responses to this area of questioning suggests that there is perhaps more that could be done to publicise and raise the profile of respondents' successes at school level, with head teachers perhaps appearing as an enabler to this process.



However, the respondents' themselves reported a rather low level of active self-promotion as only 34 per cent agreed or strongly agreed that they actively seek to publicise and celebrate their work and successes to colleagues across their setting (chart C5). This rose to 56 per cent in relation to how actively they self-promote to their Head/line manager (56 per cent) and to governors/trustees (48 per cent)



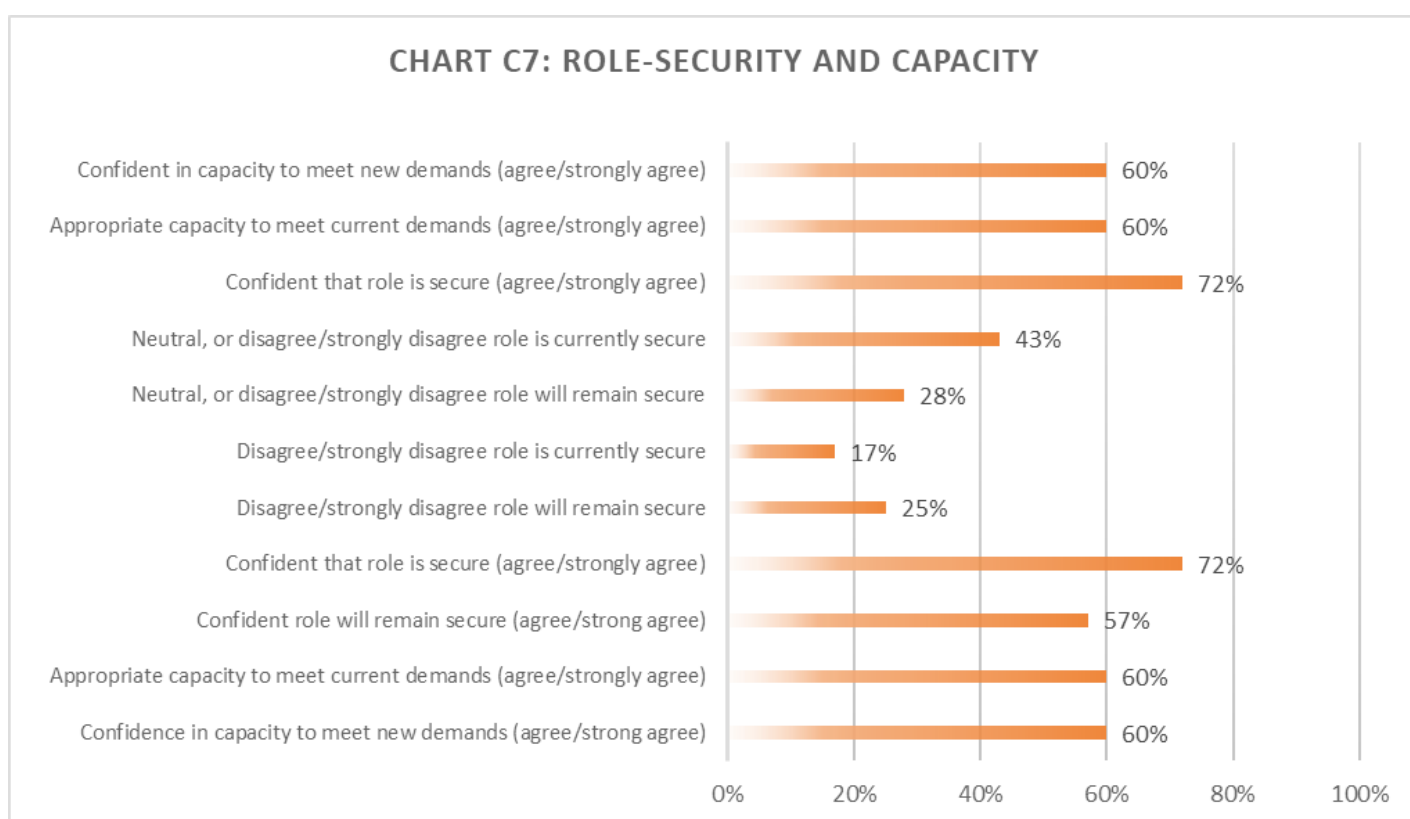
Although this suggests respondents could be more active in promoting their own successes and the impact of their work to their school communities, a tension in how respondents reported the means to publicise their role and successes emerged (chart C6) as only 41 per cent of respondents agreed that there was adequate means to do so to colleagues across their setting.



## Role-security and capacity

Moving to thoughts around role security and capacity (chart C7), there was a general trend of respondents feeling confident that their roles were currently secure with 72 per cent agreeing or strongly agreeing to this statement. However, there this was reduced in relation to the future with only 57 per cent agreeing or strong agreeing to this statement, suggesting that this is less certainty of future role-security for some respondents. It is important to note that there are 'neutral' markers presented in responses, with 11 per cent currently feeling neutral about their role security and 18 per cent feeling neutral about this for the future perhaps indicating further uncertainty about this from across the sample.

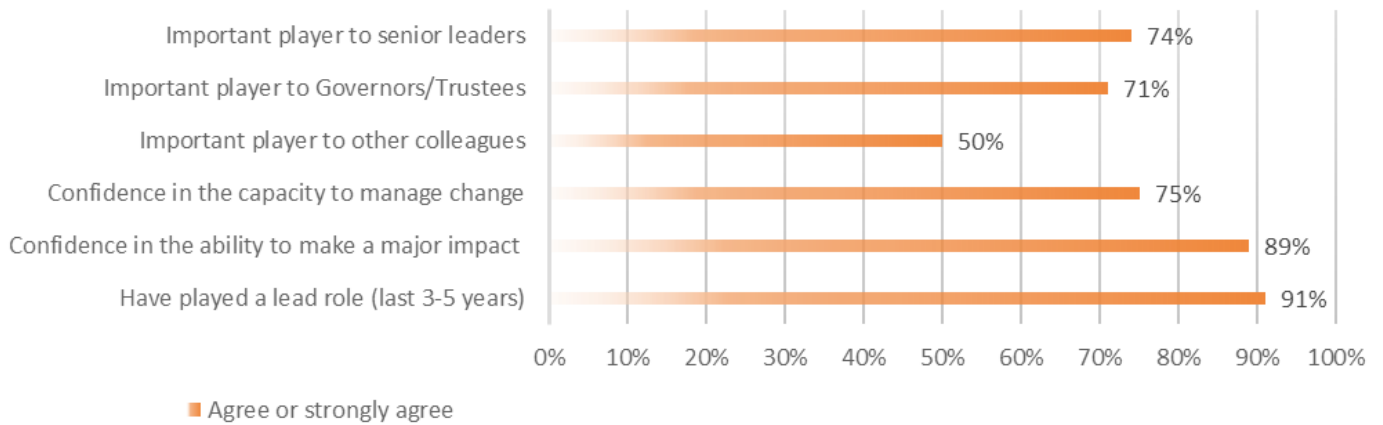
Furthermore, as chart C7 also presents, despite 60 per cent of respondents agreeing that they had current capacity to meet new demands and were confident in their future capacity to meet new demands, 17 per cent of respondents disagreed or strongly disagreed that their current was secure, with just over 25 per cent indicating they strongly disagreed or disagreed that their role will remain secure in the future.



## Managing-change

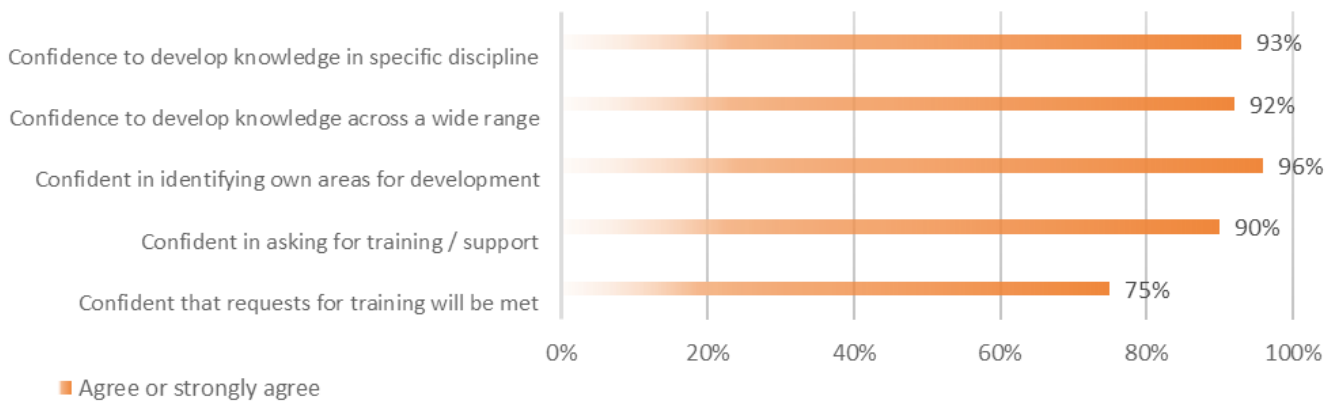
There was a general theme of most respondents reporting that they felt confident in their ability to manage change and make a major impact on their settings (chart C8), with many respondents indicating that they had taken a role in managing change in the last 3 to 5 years. There was also considerable agreement that senior leaders and Governors / Trustees see them as an "important player" in managing change in their settings with almost three quarters of respondents agreeing or strongly agreeing to each of these statements.

However, only half of the respondents agreed that other colleagues in their setting saw them as playing an important role in managing change. Themes also emerged in the open-ended comments around a lack of contribution to local structural reform e.g. academisation or multi-academy trust formation, which suggested a further area to probe in later data collection phases.

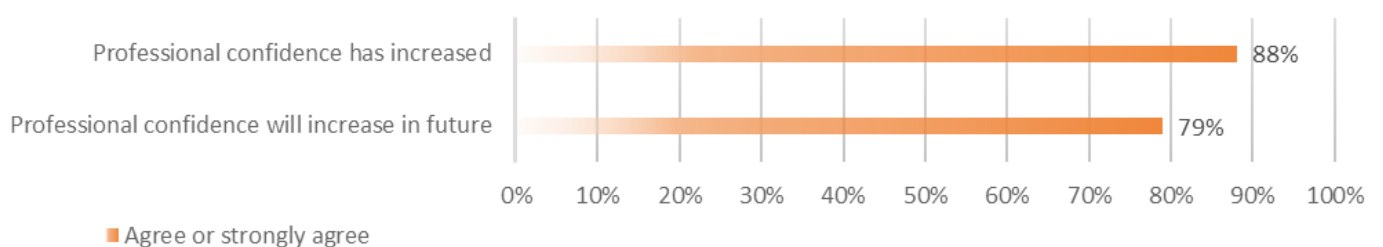
**CHART C8: ROLE IN MANAGING CHANGE**

### Role development

Respondents were asked to rate their level of agreement to a series of statements around how much confidence they had in their current professional knowledge (chart C9). They were also asked to rate their confidence in developing their knowledge further to meet changes in their settings in relation to policy reforms, including confidence to develop in a specific discipline or across a wider range of school business functions. Furthermore, confidence levels were generally high across the sample, with many respondents appearing confident in their ability to assess and identify their own areas of development, and in developing their knowledge further.

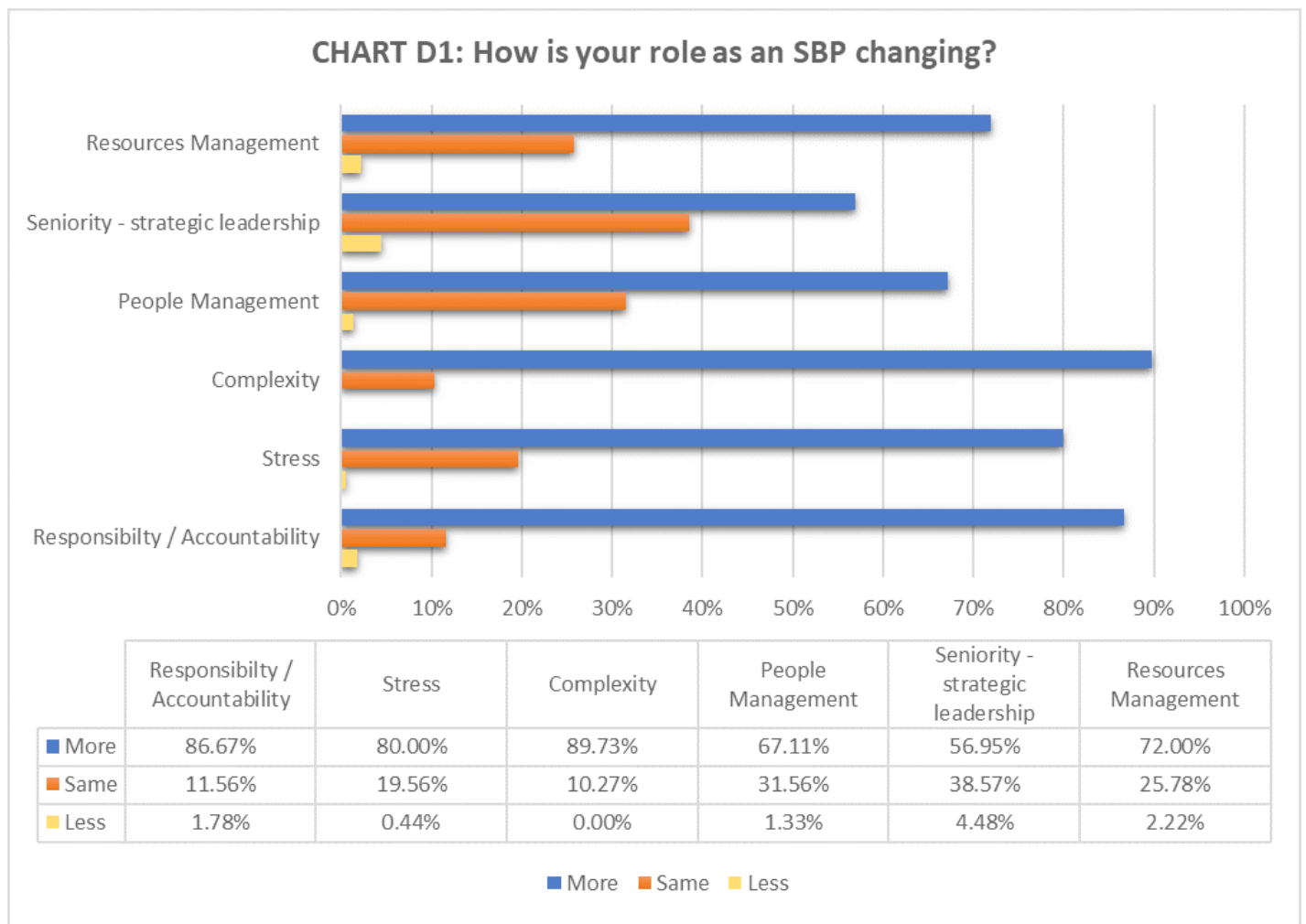
**CHART C9: ROLE DEVELOPMENT**

Overall, as chart C10 presents, most respondents felt their professional confidence has increased over time (88 per cent), with slightly less respondents indicating the same for the future (78 per cent, a drop of 9 per cent). There were several comments in the open-ended questions from the portion of respondents who disagreed that their professional confidence will increase (5 per cent) raising concerns around future job security, ability to input into decision-making and a lack of recognition of their role.

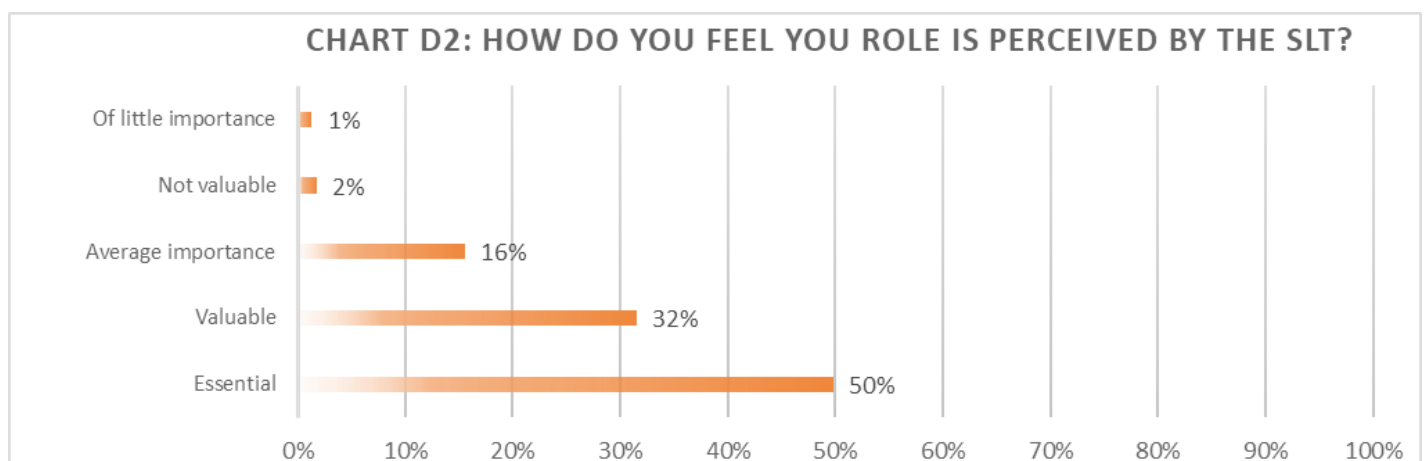
**CHART C10: PROFESSIONAL CONFIDENCE**

## Analysis of Section D (Further thoughts)

In section D of the survey, respondents were firstly asked a multiple-choice question and one further Likert scale question, concluding with three open-ended questions. Chart D1 presents the first multiple choice question, which asked: 'How do you feel your role as an SBP is changing?' and highlighted increasing complexity and accountability of the respondents' roles.



Respondents were asked to select one option from a Likert scale to reflect how they felt their role is perceived by their senior leadership team (SLT), with 50 per cent of respondents feeling their role is essential to the SLT and 32 per cent feeling it is valuable.



However, themes emerged from the open-ended comments presenting tensions around how SBP contribution is received by senior leadership team members. Issues raised included a lack of recognition and value of SBP expertise and input in relation to that of teaching-members of SLT along with matters of pay inequality. This presented an emerging theme of leadership inequality in relation to SBP status and credibility warranting further exploration in later areas of data collection, particularly as to how SBPs feel about their inclusion to SLT and how they are valued by SLT members in school settings.

The three open-ended questions on the survey receiving a combined total of 435 comments from the 258 respondents:

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What one aspect of your role causes you the most concern/stress?	223 comments
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Is there anything else you would like to share about how you feel in relation to your professional confidence and growth as a school business professional?	117 comments
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Any other comments you might have about what you feel should be the priorities for NASBM as we become the Institute of School Business Leadership (ISBL) later this year.	97 comments
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Due to amount of data involved, responses to these questions were thematically analysed to generate overarching themes, as follows:

- Funding cuts, increasing accountabilities, workloads and complexity
- Professional Status
- Multi-academy trusts (MATs):
- Strategies to aid the growth of the profession

### *Funding, cuts, increasing accountabilities, workloads and complexity*

Many comments featured concerns around funding cuts and policy reform and uncertainty for the future with worries around matters of role security, decreasing capacity and increasing workloads with many comments stating they were being expected to do more work with less resources.

The increasing complexity of financial management was also raised by many respondents, with many highlighting the additional time required to balance budgets when resources are stretched resulting in many conflicting priorities and competing expectations.

Many stated the breadth of the role was getting wider as accountabilities at school-level grow and constant policy reform brings new challenges. Many commented on the increasing management of people as priorities compete, resources reduce and conflict grows, especially in times of major change often increasing stress levels. Many comments included concerns around increasing stress-levels and concerns around resilience and well-being.

Some example comments include:



'...**financial challenges** are making the role increasingly challenging.'

**Sustaining a financially viable future** without weakening the school's ability to deliver excellent educational outcomes.

'Financial management leading to **redundancies**'

'Budget constraints and **uncertainty** over future funding'

'The lack of control over the real **cuts in funding** and the imposition of **additional costs**'

'Lack of budget means that the **support staff are stretched**, I end up picking up too much low-level work due to lack of staff **which prevents me from doing the 'real' SBM stuff.**'

'It is a challenge to keep up with the pace of change whilst trying to manage the **workload**'

'The volume of work and the **lack of support**'

'**Constant change** in direction from LCC / Government'

'Capacity - **no middle management to assist in my role**, no time to research / prepare for anything - fire fighting all the time'

'**Business Management in schools is all too frequently an afterthought.** The SBM is put under too much stress to "cope". I frequently get called in to help fix situations, but the problem is most likely in the leadership, who do not appreciate being told that the problem is of their making, not the SBM.'

'**Managing staff expectations** when they are expected to work harder with less money available for resources'

'**Stress levels have increased** as the role has developed. Changes such as change in leadership, academy conversion have created additional pressures and increased workload.'

It is constantly evolving and expectations are growing all the time, this brings **increased workload and stress but also a wealth of experience.**

'Capacity and quality of support I give to my 13 schools. **The larger the group - the more complex issues develop.**'

'...balancing budget, meeting EFA deadlines, **everyone thinking I am the font of all knowledge**'

Workload is also a real issue as **SBMs are expected to be experts and lead on so many areas** of school operation and development.



### Professional Status

Many comments featured around the lack recognition of the profession alongside teaching colleagues and highlighted a lack of workforce equality between teachers and 'support' staff, especially in relation to leadership equality on SLTs. Tensions around matters pay, terms and conditions were raised, but a greater concern was shared by respondents around the disparity in how SBP input is valued compared to that of teaching colleagues.

Additionally, issues with the level of SLT understanding around the importance of strategic business management and with several respondents indicating that they regularly participants in senior team meetings, however, they felt they were not seen as equals was a cause of tension, frustration and impacted on the ability of some respondents to do their job, as well as leaving some feeling demotivated.

However, there were a minority that indicated they felt very included and valued by their head teacher and/or SLT, which had positively impacted on levels of confidence. Examples of comments include:



**'The LA and Welsh Government don't value my profession at all.** They advocate handing back the authority for delegation to the LA.'

**Without recognition from the wider school community** the role will not be valued and remunerated as it should be.

Great Job - just **no understanding/ recognition / suitable salary level or time** to do it!

The way some **non-teaching staff are treated as lesser beings than teachers.** Both are equally necessary for an effective school.

'I have a lot of experience in many areas yet the **SLT academic staff always feel they know best even though they have very little or no experience** in some of the areas that are discussed.'

**The lack of understanding by my colleagues that we are a big business and must follow business principals and meet all our statutory requirements** however boring they think they are and that the administration of such does not take only 10 minutes

'Many **head teachers lack the experience and broader business competencies to operate in a resource constrained environment; many do not yet fully trust non-educationalists** to support them to deliver their outputs within allocated resources.'

**My confidence is partly the result of working for an excellent head teacher** who is due to retire before me - I worry about the period after that, as I hear stories from colleagues about lack of recognition

'**New SLT** within last 2 years who **see me as a strategic leader** and part of the team. Helped to improve my professional confidence.

'In my new school **I am privileged to have inherited a leadership team in the school that recognised the importance of business management & strategic leadership** and it has increased my confidence as a result in carrying out my role'

'Unfortunately, as **I am at a primary school, my role is seen as not important, I am not on the SLT** and am not being supported in my studies'

'**Lack of recognition from HT/SLT & Govs** to the importance of my role and the amount of workload I have and want to cut my hours from full time all year round to 3 days per week term time only but still doing the same amount of work. They've stopped me from attending Governor and SLT meetings as my input is no longer required.'

'**The profession is still not fully recognised as part of senior leadership. I am a member of SLT and attend all meetings. I have the full support of the Head, but other SLT members do not treat me as an equal,** and often ask me to do things such as photocopying or taking minutes in SLT meetings. **There is resistance to taking my advice on matters where I have professional qualifications,** such as Finance and Health & Safety, which is frustrating. I feel that **some schools still operate on a belief that only qualified teachers can be viable senior leaders.'**

'In my current setting I feel that due to **lack of understanding by the SLT my role** is not valued, and I am not given access to relevant strategic and financial information at the appropriate time. I am involved late on in decision making and my contribution is then viewed as a threat.'





## Multi-academy trusts (MATs):

Concern and worry around academisation and the formation of MATs, particularly in relation to the centralisation of business and support services, presented as a strong theme. There were many comments presenting with considerable uncertainty for the future in relation to MATs, with respondents sharing their worries around matters of role security, capacity and workload. There were many reports of SBPs not being valued at Trust level and a lack of input and inclusion of SBP voice. Career-pathways were also raised often as to whether specialising was a way to protect job security, such as taking a finance route, however, there was much uncertainty around this as capability was raised in terms of professional development and the transferability of qualifications, knowledge and skillsets between contexts such as local authority schools and academies. The complexities of working across MAT structures were also raised in terms of the fears around reducing the number of SBPs roles.

Examples of comments include:



'My confidence is probably lower than normal at the moment due to significant change with the MAT I currently work in. **The MAT is starting to centralize many aspects of business services**, including finance, which has historically been a significant part of my role. **They are outsourcing all the business services we ran internally which is impacting on my role**, to now have a monitoring aspect as opposed to management of. Hence, I am in a period of significant change with the likelihood that SBMs will no longer be required in future.

'Lots of opportunities, but as a jack of all trades master of none, a concern as SBM roles shape into more **distinct specialisms as we move into MAT structures.**'

'My only **uncertainty** about the role is that it may diminish or go all together if the school becomes an academy'

"Through [MAT] conversion **my role has grown and developed into a complex and demanding role, this has increased my confidence** and knowledge as I have had to develop these areas quickly"

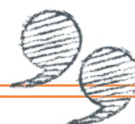
"I feel since we converted to an academy as part of MAT that **my career has ended.**"

**"We have recently joined a MAT and I very much feel that my role is not one which is valued** across the Trust and I am just seen as a glorified administrator. Due to funding cuts my job was at risk this year..."

At school level **the growth of individual school SBMs is stilted as some work areas are centralised.** Finance, HR, and strategic H&S are now coordinated **at central MAT level** which brings much complexity in my role. We are replacing SBMs with office managers as their remit alters the larger we grow.

**Joining a MAT has hugely changed my role.** I was in a 'traditional' SBM role but now specialise across 4 schools in premises, IT, facilities and external income generation.

Multi Academy Trusts bring about **exciting opportunities for collaboration and economies of scale, however from a School Business Management perspective I feel that the expectations of my role are completely unrealistic.** As a result, **I am reconsidering my future in this profession** which I had previously enjoyed and felt I made a real difference in, for over 17 years.



## Strategies to aid the growth of the profession

There were many interesting suggestions and rich comments about overcoming challenges to help aid professional growth. The main strategies that appeared were focused on: promoting and raising the status of the profession to others across the sector, including equality of pay, access to CPD and the formal inclusion of SBPs as leadership team members; the importance of in-school support from head teachers and SLT; participating in networking, CPD and knowledge-sharing and accessible events. There were also many comments about the need to be assertive and take ownership of career development as an SBP as well as the value of supporting others in the profession.

Examples of comments include:



**'Networking opportunities are imperative** for me to know that I am not alone and pick up changes through presentations at meetings or through discussions with colleagues.'

'Professional confidence is enhanced by **meeting with other SBM colleagues** - they will recognise and celebrate your skills far more than staff in your own school.'

'Facilitate collaboration between SBLs to **share knowledge**'

I feel strongly that my years as a SBM has helped me reach the position I now am in. **I hope I can offer a better understanding to other SBMs/Finance Officers** in our academies and support them with the additional roles and responsibilities they are now facing.'

**'You have to be prepared to get out there and pursue what you want.** I'm lucky that I have a supportive team - but you don't get anywhere by sitting on your backside and moaning. **Be positive and contribute then you will gain recognition.'**

'I feel that **I am very lucky to work in a school that appreciates and embraces the** role of School Business Manager - there has never been any question about me being a full member of the SLT and involved in all aspects of the school strategic planning.'

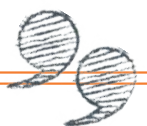
**'Head teachers need to allow their SBM's to utilise the business knowledge and skills they have** to support the running of the school and allow them more autonomy.'

'...acknowledge **the differences** for those of us working in Wales and tailor some communications/training, etc, to our needs, too.'

'Having completed SBM qualifications and becoming a NASBM fellow, **I still find myself not progressing in my career as I have no Accountancy qualifications'**

**'Equality** of recognition **and parity** of pay and conditions as other members of the senior leadership team

'All **business managers to be on the SLT and to be paid on the Leadership scale** like the Teaching leaders'





'Support for **recognition of roles** and importance in schools and reflected in **pay as an SLT member** when other SLT members earn considerably more'

'Promoting SBM as a **career path**'

'**Publicising** the importance of the role.'

'There is still a lack of knowledge about the professional qualifications of SBMs and lack of understanding of how broad the role is. I think **greater publicity of accreditation will help** this.'

'Ensure SBM's continue to have **access to high quality CPD**. Drive improved financial rewards for SBM's to more appropriately reflect contributions to school management and leadership.'

'With funding cuts expected to have a big impact on staffing structures in schools, I feel **management of organisational change and associated skills will become more vital.**'



### 4.3 Summary of survey findings

A range of respondent backgrounds appeared, with some commonalities in age, gender, career-phase and qualifications. Many identified as 'school business managers' with sample spread across a range of school types and education phases. Most of the respondents were 'senior generalists' in their settings with considerable experience in the profession and 96 per cent of respondents reported their inclusion into the SLT and indicated a good level of confidence and recognition at school level. However, as data were interrogated across the survey, particularly the qualitative elements (437 comments in total) tensions emerged as it appeared that despite most respondents' roles being formally included as part of the SLT, many respondents indicated mixed views and considerable frustration around how their contribution and input is valued by senior colleagues. Concerns around increasing role complexity and decreasing capacity also often emerged in comments, with the MAT agenda in England often surfacing in addition to funding pressures and workload issues, which resonated with a decrease in confidence levels around respondents' future role-security. Comments around job security, fears of redundancy often featured and frustrations around the lack of opportunity to contribute to decision-making, particularly in local reforms and arrangements appeared as concerns to future growth.

Overall, the results from the analysis of the survey suggested that a good level of self-confidence was present amongst those who responded, along with many indicating having confidence in their own ability to professionally grow in the future. However, this appeared tempered with apprehensions regarding the changing nature of the sector and the outlook of senior colleagues and teaching colleagues on the value and contribution of the school business professional role.

# Section 5: Discussion group findings

## 5.1 Introduction

This section of the paper offers the key findings from a thematic analysis of discussion group data collected during phase two. The data sets were collected via three discussion groups held at the National Association of School Business Management (NASBM) conference in November 2017. It begins with a brief discussion of those involved (the sample) and then moves to an overview of the main findings and a thematic presentation of the debates held across all three groups before the section concludes with a summary consideration of the research.

### *Discussion group sample*

Those attending the NASBM conference were invited to participate as discussion group volunteers via conference publicity. The debates were structured around three key questions (as shown in section 5.2). Two groups were held on day one of the conference and a third group held on day two to allow as many participants to attend as possible. In total, there were 26 participants across the three discussion groups, with between five to ten participants in each group. The participants were predominantly female with many voluntarily indicating being in their mid-to-late career with at least three or more years of experience in a school setting, with many participants indicating eight years or more experience. Qualifications were not explicitly discussed or collated, however, during the discussions several participants voluntarily disclosed having either undertaken school business management qualifications, finance certificates, such as the CIPFA Level 4 or Level 7, or other degree or postgraduate qualifications. Two participants also voluntarily identified themselves as chartered certified accountants.

The participants were asked to indicate their school context, which appeared spread across different school-types. This included: twelve local authority (LA) maintained community schools (including four special schools and two Welsh schools), seven multi-academy trusts (MATs), four standalone academies, and three foundation trust schools (including two faith schools). The phase of education was spread with the secondary phase appearing as the most predominant setting closely followed by the primary phase, with special schools and other cross-phase settings (e.g. MATs) also represented. Role titles were also not collated across the group, however, at various points, participants volunteered their role title including 'school business manager' and 'director' titles, such as Director of Resources, Finance or Business. There was an apparent diversity in the level of seniority of participants in their settings along with a varying range of responsibilities, with some participants indicating they held a generalist role in an individual school and those in MATs indicating a specialist or generalist role.

## 5.2 Discussion group findings: key themes

Participants of all groups were asked the following questions:

1. National reforms to schools and business management have been rapid; what do you feel are the biggest future challenges faced by the school business professional (SBP) community?
2. What strategies and methods do you think will aid professional growth and development of the sector?
3. How could greater awareness of the work of SBPs be developed across the school community?
4. Open discussion regarding professional confidence in changing times

## Overview


Discussions around funding cuts, financial pressures, shifting local contexts and growing workloads dominated most discussions and were situated within a wider debate around the impact of policy reform. This was alongside a concern for a lack of school business professional (SBP) voice in matters of reform at both a local and national level. There were also concerns around a lack of SBP voice in-school with many participants indicating limited input into strategic development and resource decisions in their schools.

The status of the profession and a lack of equality at leadership level were raised as the biggest professional challenge for most participants as issues with the inclusion of their input at senior leadership level were raised. Many participants reported a general lack of understanding of business functions in schools from their teaching colleagues as tensions around the credibility and value of their input were highlighted as a 'battle' to be taken seriously alongside teachers and teaching-leaders. Furthermore, matters of pay equality and access to professional development were raised as challenges to professional growth. Head teachers and principals were identified across all groups as critical allies in raising the status and contribution of the SBP role in-school as well as across the profession. However, participants offered a variety of contrasting experiences with their head teacher or senior leaders highlighting different levels of appreciation and inclusion regardless of whether their role was a formal senior leadership team (SLT) member or not. These views were consistently expressed in combination with concerns around inconsistencies in robust governance, holistic leadership and financial strategy. However, where SBP input was reported as enabled and encouraged, stories of successful impact in schools and optimism for the future were more common.

In the context of potential Trust formation in England, e.g. forming or joining a Multi-Academy Trust (MAT), participants were mixed in their views as to whether it was a positive move or a negative move for schools and for the growth of the profession. Some felt the MAT agenda presented opportunities for growth, as well as the chance to be innovative and generate revenue for schools, but only if the structures were set up in ways that can support this from the outset. However, other participants, from local authority schools in England and MATs, presented a wary view to academisation and were mostly against MAT formation due to a perceived lack of benefit to the school, the costs and risks involved and the concern for the autonomy of smaller schools in larger structures in addition to risks around their own job security. Welsh participants felt that they could not add much to the MAT debate but were wary of the MAT agenda and felt frustrated that much recent training and development across the profession appeared to focus more on those in academy settings e.g. the CIPFA finance certificate.

Many ideas to support the development and growth of the profession were offered, with all participants highlighting the importance of networking, knowledge-sharing platforms, mentors and role models. However, there were concerns about the increasing diversity of the profession and many participants felt there was a need for clearer guidance around career pathways, qualification and training. Many also felt that the generalist role was vital to individual schools and needed to be advocated and protected in the wake of Trust-level executive structures and the recent growth of specialist roles.

The main themes of the discussion will now be explored in turn.

- 
- Structural Reform
  - Lack of status and recognition partnerships
  - Head teachers as gatekeepers: The need for a strong alliance
  - Role Development

### Structural reform, funding and workload

Structural change and policy reform were raised as considerable current challenges to the profession and its future growth as the recurrent themes of financial pressure, the national funding formula (NFF), new policy initiatives and changing local accountabilities were at the forefront of concerns. There was strong debate about the NFF and most participants felt it would bring a reduction of funding to their schools which would intensify their current struggle to balance the school budget. Many participants also felt financial pressures were increasing their workload and were influencing stress levels as many reported their worry regarding the future financial health of their schools.

*'I've seen it all before; there has never been any money in education for schools. The NFF won't change that!'*

*'...I have no idea how we will survive financially. I cannot balance the budget...'*

Many participants also shared concerns around 'the reality of reducing SBP roles and the fear of redundancy' in the context of 'increasing financial pressures, workload and role complexity'. Indeed, many participants shared similar stories around a growing fear of potential job loss with some highlighting decreasing staffing levels in their local areas.

*'...we've lost eight teaching assistants and three office staff in the last 18 months...'  
'...a lot of staff recruited in the last two years are on fixed contracts and won't be replaced...'*

As concerns around funding were shared, including the increasing complexity of financial management and reporting, concerns around the reduction in local authority support were also raised as many participants spoke of struggling to cope with increasing workloads due to changing expectations at school-level requiring more time to manage additional tasks.

'...each new policy initiative and funding announcement brings another real-term cut for us and we are also being expected to do more and more with less and less...

'...SLT don't quite seem to get it but I know the tank is running dry and we are coasting on fumes...'

It was generally agreed across all groups that local support for schools is reducing with more being expected from staff who are often working with a smaller resource due to funding constraints. Several participants also raised the issue of supporting the morale of those who have seen their pay cut due to local job evaluation by their local authority (LA) or had to take a cut in hours due to a reduction in funding for support.

'We are being expected to do a lot more work but on the same hours, and with fewer staff and some are on less pay too after job evaluation...'

'SLT are talking about forming a MAT because it might save money by using a 'pool' of support staff across schools but I am not convinced... I can't do my job as well as run 'central services' as the idea is to reduce staff, not recruit more...'

Furthermore, uncertainty around the future of the SBP 'generalist' role was prevalent across all groups, with many participants perceiving it as a vital role in individual schools. Indeed, all groups, especially participants from Multi-Academy Trust (MAT) settings, debated the pros and cons of MAT formation. There was considerable discussion as to how SBP roles would work across schools with a mixture of opinions from those in MATs about their effectiveness across multiple schools.

'I am a generalist spread across schools and I don't sit on the MAT executive management group, so my role has become very reactive...'

This prompted debate as to how a generalist role could retain vital contextual knowledge across multiple schools to make informed decisions. This included discussions around a senior generalist role in MAT setting, with the role of a chief operations officer (COO) often raised as a key role at Trust level supported by specialists, with generalists still remaining at school level. Those in LA settings remained especially wary around the feasibility of working across multiple schools without a senior generalist present in schools to work with. Many also shared concerns around the local balance of power between secondary schools and primary schools.

'I worry about huge MATs becoming a repeat of inadequate LA SLAs... we came out of the LA to get better SLA and more efficiency but if we get too big we will just go back to that and we don't have the resources to staff it'

'Secondary academies seem to want to control the primary academies in MATs. I am hearing lots of stories from frustrated Primary SBMs'

Participants from Welsh schools felt they did not have much to contribute to the MAT agenda as it is irrelevant to their settings, however, they shared frustration by how conversations across the profession in recent times were often dominated by the MAT agenda. However, like most participants in local authority schools in England and some participants based in MATs, they agreed that there was great potential for collaborative partnerships and local federations, yet they did share concerns around the focus of specific roles in divergent structures. Indeed, the potential for increased opportunities for efficiency, innovation and income generation in multi-school settings was raised by many participants, with those in MATs reflecting on how this took time and required appropriate resources, staff and structures from the outset.

'There are opportunities to be more creative in a MAT, but you need the structure and the strategy to support you in doing that, and the support for the workload that comes with that..'

'...negotiating conflicting expectations of support is taking up a considerable amount of my time in the MAT... there is currently no capacity to be innovative...'

There were also further reflections that 'It's more expensive to be part of a MAT... centralizing isn't necessarily good value for money', especially from those in currently working in MATs. Overall, there was agreement that if MATs were to be successful increasing greater efficiency and opportunity for schools, there was a need for SBP voice to be present and influential in matters of strategy, staffing and structure to ensure such opportunities could be sought and development.

'...we are about 18 months into [being a MAT] and we've only just started to see the benefits from the new processes and systems that were set up and there is still a long way to go...'  
'I had a lot of input into the business services and how we centralized some aspects so there have been some opportunities to create efficiencies...'

There were also many comments across the group that SBPs have a key part to play in collaborative settings and MATs, with generalist and specialist roles both able to contribute. However, there was concern that there is an over-emphasis on specialism in MATs, particularly in terms of financial qualifications with the role of Chief Financial Officer (CFO) felt to be increasing across the sector. Furthermore, many participants across different education phases argued that 'specialism' appeared especially challenging for those in primary schools and those from generalist backgrounds without specialist financial qualifications. Indeed, there was common story across the groups that this appeared to be influencing the risk, and fear, of redundancy.

'...if we were to become part of a MAT, I don't know what would happen to my role and those like me in other primary schools.'

'I cannot imagine they would keep my role as part of the school SLT if there was going to be a central service in the MAT doing all the finance, contracts and HR for our school. What is going to happen to my role in that situation?'

Overall, reductions in funding, structural change, increasing accountabilities and workloads were highly debated topics along with much discussion around the increasing diversity of the profession and the emergence of specialist roles and the fear of redundancy. These issues appeared influential to confidence levels regarding the future growth of the profession in the context of uncertainty and new emergent structures, especially in England. It was felt that there was a great need for clearer career pathways and guidance around the transferability of qualifications, in addition to the advocacy of the SBP generalist role.



## Lack of status and recognition

Across all groups, it was unanimously agreed that the lack of status and recognition of the profession across the education sector was a major influencer to a lack of SBP voice at local level and in matters of structural reform. Many participants reported their frustrations of being not recognised alongside their teaching-leader colleagues despite the accountabilities, duties and expectations of SBP roles growing. Some participants indicated that they were not part of the senior leadership team (SLT) and others explained that they were 'officially' part of the team but often found themselves left out of major decisions and curriculum matters.

*'SBMs needs to be an SLT role formally'*

Those that indicated formal inclusion and input into decision making explained that despite their role being a senior role in their school, they questioned how much impact they had in SLT meetings, or in governor's meetings due to how their input was valued by others present. The consensus across the group was that the value of SBPs roles was influenced by a continued historical cultural divide between teaching staff and 'support' staff. Many felt that this created barriers within schools at all levels, especially senior leadership level, and could often be a demoralising issue with a negative impact on professional confidence and the potential of SBPs to contribute to schools

*'We are classed, identified and positioned as support staff, or worse, as non-teaching staff'*

*'Dispense with the 'non-teaching' staff label. To be a non-entity is demoralising, no one should be a 'none' staff member'.*

It was felt that the profession requires significant investment from all stakeholders – from a variety of staff in schools, to professional associations and policy-makers – to promote greater SBP voice and ensure greater equality is embraced at all levels, especially leadership levels. The diversity of perspective was highlighted as important to schools due to the changing context and increasing complexity of school operations and improvement, however, many participants felt that SBP was not valued in decision-making to the extent it should be which was increasing the risk to schools, especially financially. It was also felt that the equality of access to qualifications and continuous professional development (CPD) across the wider sector required improvement.

The work of ISBL along with the National Association of Head Teachers (NAHT) and the Association of School and College Leaders (ASCL) on promoting the importance of the profession was highlighted as important and highly valued by participants of the groups. However, all groups reported the need to see increased partnership in addition to an increased focus on the promotion and equality of the profession by the Department for Education (DfE). Furthermore, it was felt by most participants that SBPs have a key part to play in raising the profile of their role in schools and across the sector by networking and collaborating with other SBP professionals and fellow school leaders. It was felt that by SBP sharing their success stories, as well as involving themselves in opportunities to collaborate and promote their work, and in some cases leading knowledge events at both local and national level, this would help to raise their profile and showcase the impact of the profession in schools.

*'As an SBP you need to take ownership and do things, like training or attending events...or keeping up to date'*

However, there was a shared concern that there was a lack of confidence around assertiveness across the profession. Several participants who have worked in system-level role or as mentors to other SBPs reported that they have encountered many professionals would have found it difficult to assert their voice due to the power dynamics at local levels and have struggled to challenge teaching colleagues. Other participants explained that they have tried to constructively challenge teaching colleagues yet have found that their voice is ignored due to their lack of qualified teacher status despite them often holding considerable experience and qualifications in the matters they are seeking to challenge.

**'You have to stand up for yourself and stop justifying everything you do and do it.'**

**'...doing the right thing rather than doing the thing that people think is right'**

Many participants stated that they had found their qualifications and professional networks had been helpful in bolstering their confidence, with many indicating that their local SBP colleagues were crucial in supporting their resilience as professionals, especially when they felt devalued. Others reported the value of local networks in helping them find the courage to challenge and assert matters of compliance when teaching-leaders did appear to appreciate or understand their credibility in leading on various matters. Many also felt that it was important to work together as a profession to continually support members in what they can change in their local context, which may be eventually influential to a shift in mindset around SBPs roles

**'There appears to be so much that we can't change about the sector, so we should focus on what we change in our schools and our roles'**

Overall, many participants reported the ongoing frustration and continual 'fight' in having to prove themselves at local levels, with many stories of working hard for years to gain credibility amongst teaching colleagues. Although there was a sense of challenge-fatigue shared by many across the groups, those with more 'forward-thinking' SLTs who understood the importance of school business management and the role of the SBP had found this support vital in finding the resilience and energy to continue to challenge views and gain credibility in a wider setting, along with support from their professional networks.

### **Head teachers as gatekeepers: The need for a strong alliance**

The head teacher role appeared as a 'gatekeeper' for SBP input at SLT level and the relationship between SBPs and head teachers was felt to require a strong alliance as a strategic partnership to enable schools to grow and thrive in the future, especially considering changing accountabilities and increasing complexity at school level in matters of business and finance compliance

**'The head teacher can be a huge ally and supporter for the role – if they understand the work and its importance to schools...'**

However, there was a mixture of experiences in participants stories as head teachers appeared either as enablers or barriers to SBP impact, contribution and professional growth. The consensus was that head teachers who understand the SBP role and the importance of business functions in school often enable SBP impact in school and can positively influence the professional confidence and growth of SBPs. Conversely, head teachers who did not appear to understand or value the SBP role or appreciated the importance of business leadership in school, often became a difficult barrier for SBPs to negotiate which in turn negatively impacted on the ability for participants to contribute in school and was felt to be a hindrance to professional confidence and growth.

'Often Heads and SLTs don't understand the business or governance aspects or they don't see it as that important, so you are constantly having to fight for recognition to be taken seriously...'

During the discussion, the majority of SBPs in English schools facing structural changes through academisation or Trust formation (e.g. forming a MAT) felt they did not have enough input into the development of governance, leadership and infrastructure in their settings. Many reported their frustration at not being able to contribute considering their backgrounds placing them in a strong position to positively participate, however, the common story was that they were without a platform to do so.

'I have a background in governance and worked at a senior strategic level but discussions about whether we should form a MAT with our local schools happen without me...'

However, there were some participants who held an opposite view and said they felt included and consulted from the outset of MAT formation and had achieved a positive impact in their settings. However, this was the minority story and those not facing structural change, such as those based in LA schools in England and Wales, were quite wary from their observations of structural change, particularly in terms of how much voice they would have in larger structures when it had already been a long journey to gain a level recognition in their current settings.

It was also heavily felt that as local accountabilities evolve, head teachers, and those aspiring to Headship, appear to have an increasing knowledge-gap regarding school business management. This was felt to be influencing how the school business profession is understood and valued in schools. Concerns and questions around the content of teacher training and senior leadership training programmes, such as NPQH, were raised by all groups, with many participants feeling there is lack of focus on governance and business leadership in qualifications for school leaders. Many participants shared the view that SBPs have the skills that many senior leaders and teachers are lacking and must work to increase their confidence in asserting their views, challenging ideas or gaining inclusion.

'SBPs are highly qualified, skilled and experienced as professionals who understand the needs of their schools and should act upon requirements, initiatives and strategic goals, not seek permission.'

However, the ability to critically challenge teachers, SLTs and governors was presented with a mixed view as many debated their own degree of confidence in challenging their colleagues due to the power dynamic of the head teacher and SBP relationship, with some suggesting that SBPs should report to the chair of the governing body/board to avoid difficulties

'You must be willing to challenge the head, the SLT and governors and not live in fear of any personal repercussion from that. You have to be that critical friend - it's your job to do that!'

Two groups shared mixed stories of challenging their head teachers with some indicating that it had led to tension and others explained it had negatively impacted on their inclusion to decision-making. However, the consensus from all groups was how important it is for SBPs to challenge those in their settings especially where matters of compliance are involved, such as health and safety or employment law, and financial standards.

Overall, there were interesting debates around the knowledge and understanding of SLTs and head teachers and the level of recognition and appreciation this influenced in regard to SBP input and how this is valued by SLTs, but the main theme was that a 'forward-thinking' head teacher who understands the SBP role can be an important ally in what can be quite an isolated role in schools.

## Role Development

Conversations around strategies that could help to raise the status of the profession often turned to continuous professional development (CPD). All groups shared similar comments on the need for a deeper investment in CPD and qualifications for the profession at a sector-wide level, reporting their frustrations at a lack of equality in school leadership CPD. With such rapid reforms influencing the school context, a clearer career pathway was heavily expressed as necessary from all participants.

*'Predicting a future career path is hard. There is a question of whether you specialise or not; what is the way to protect our roles and careers?'*

The growing diversity of the sector, especially in England with the MAT agenda, along with a consensus around increasing accountabilities at schools-level, presented the variety of context in which participants were operating. A sense of confusion around the future of the 'generalist' role and the more emergent nature of 'specialist' roles at local and executive levels was apparent as many debated whether to specialise to increase their job security. Many participants shared fears around a lack of transferability of their generalist business qualifications into executive structures (e.g. in settings like MATs), with some participants commenting that they have undertaken, or are considering undertaking, qualifications or training to 'specialise' as a way to future proof their role and 'survive' in the changing school context in England

*'the generalist role is in danger and will change but where should we specialise? It's not so clear – finance, HR, premises? All are vital but what should we be thinking about?'*

Several participants were struggling to see a place for themselves in larger MAT-type structures based on the qualifications they currently held in comparison to what they have witnessed MATs recruiting for. For example, two groups raised the question: *'What is the best finance route for SBPs? Should we consider CIPFA, CIMA or ACA?'* A heavy debate around accountancy qualifications followed and whether the Chief Financial Officer (CFO) role will dominate the landscape at both school (local) and executive (Trust) level, or whether a more generalist COO role will survive in local and executive settings. All groups shared the view that help is required to understand the different financial qualifications available and which ones might be more helpful to them and their school, and which are the most transferable, or whether they are necessary at all. Those working in a MAT presented some insight into financial qualifications with some explaining that they already had an accountancy qualification and were employed as the CFO, or they themselves were a generalist with an accountant employed in the trust as a specialist to support them. However, those in MAT settings shared the concerns of those who were not working in MATs as to how SBPs role would evolve if MATs grew and agreed that clarification around finance qualification routes would be helpful.

Furthermore, all groups felt that more work was needed by a range of professional bodies across the sector and by the government to enhance the status of the profession in schools and its equality in terms of accountabilities, pay and conditions and access to CPD. However, at a more individual level, there was a clear agreement from participants that SBPs themselves had to take ownership of their own development and be more assertive in putting across their needs in schools. It was also felt important for SBPs to take an active role in developing the profession by getting involved in networking and knowledge-sharing events, as well as role-modelling the professional standards and values and mentoring others in the profession through coaching programmes and ISBL Fellowship. Although time and resources were both heavily debated as common barriers to being able to get involved in professional development, mentoring and networking, it was felt important to assert this as a priority for the benefit of the individual and of the school and many participants spoke of the value this brought to their own development

'We need to give ourselves permission to do things...'

'As an SBP you need to take ownership and do things, like training or attending events or taking time to develop plans; stop asking for permission and saying 'can I do x, y or z. Instead, say I am doing x, y or z'.

Overall, all participants felt that SBP mentoring and coaching would be advantageous and felt ISBL Fellowship was an important aspect of role-modelling the profession as well as strong alliances with head teachers and key governors. However, this was underpinned by the need for greater equality in school leadership and clearer guidance around career-pathways and the generalist/specialist role debate. Strategies for growth that could help to raise the profile and status of the profession were felt to include wider joint networking and knowledge events and CPD for all current and aspiring school leaders and to provide more platforms for SBP voice to influence policy and practice at a local and wider level.

### 5.3 Summary

Overall, a lack of professional status, recognition and equality – particularly at leadership level – appeared as key themes and were felt to be the biggest challenges to the future growth of the school business profession. As matters of structural reform, funding constraints and increasing accountabilities were highlighted, there were considerable debates about the diversity of job titles and role focus in relation to generalist and specialist roles, in addition to levels of pay not reflecting the increasing accountability of SBP roles. Many discussions around the uncertainty of career-pathways and the transferability of qualifications also featured in relation to evolving local structures. It was felt that there was a need for clear endorsement of SBP roles at all levels in school systems by head teachers and governors; indeed, the head teacher role was agreed as crucial in enabling the inclusion, input and growth of the profession. However, a strong theme appeared across the data suggesting that SLTs, and in some cases head teachers, do not understand the importance of business leadership and management in changing contexts, e.g. when moving into large MATs, to fully appreciate and value the contribution of profession.

A joint marketing exercise by various stakeholders was felt overdue, with more work by professional bodies, the Department for Education (DfE) and other groups highlighted as helpful and necessary. It was felt this could include showcasing good practice case studies and SBP impact studies that present a variety of contexts and the illuminate value the profession can bring to schools. It was also felt by many participants that a formal and more detailed DfE census of the profession would be helpful in aiding a better understanding of the profession and the variety of roles undertaken in schools so that training and CPD can be further tailored and contextualised. It was also felt that greater equality in pay and conditions across SLT and the wider school workforce is required to reflect the increasing accountability of SBP roles. Furthermore, it was agreed that SBPs themselves need to be increasingly assertive and constructively challenge the current system to gain more recognition and pro-actively seek opportunities to raise their own profile and that of the wider profession.

# Section 6: Interview findings

## 6.1 Introduction

This section offers the key findings from a thematic analysis of phase three of the data collection which involved ten semi-structured interviews held with school business professionals. It begins with an overview of the interview group sample, then moves to an overview of the key findings, before exploring each theme in turn and concluding with an overall summary of the interview findings. The list of interview questions can be found at Appendix 4

### Interview sample

A total of ten SBPs were interviewed individually; nine from English schools and one from a Welsh school. They represented a range of backgrounds, different levels of in-school experience and varied school contexts. The interview group were 50 Per cent male (n=5), 50 per cent female (n=5) with an age range from early-thirties to mid-sixties. Most interviewees indicated being in their mid-to-late career, with their years of in-school experience ranging from just under three years to thirty years with their total career experience ranging from fifteen years to forty-five years. A mix of role titles were offered by the interviewees, with many indicating 'director' titles, however, most had seen their title change in the last few years with their previous titles most commonly indicated as 'school business manager'. Although the level of responsibility of their roles varied across their settings, which ranged from individual schools to multi-school settings, most interviewees identified as a 'generalist' overseeing all business functions in their setting at a senior level. Two interviewees identified as finance specialists in their settings, one of which was quite a recent re-focus from a more generalist role, however also had oversight of other business functions but had specialists managing the day to day operational aspects of those functions. A further two interviewees explained that they had a more generalist role, but they were becoming increasingly finance-focused in their role due to increasingly accountabilities for financial management and reporting.

All interviewees were the equivalent of degree level educated and held a range of business-related qualifications. Six of the ten interviewees indicated holding finance qualifications, including two identifying as certified chartered accountants and three identifying as accounting technicians. Five out of ten interviewees held bespoke school business management qualifications and a further six interviewees held postgraduate degree-level qualifications in business, leadership or strategy. Interviewees also had a variety of professional sector designations or memberships, with the most common being finance-related.

The school-type of each interviewee was purposefully selected to represent a range of schools, which included: four local authority-maintained community schools including a Welsh school; two standalone academies including a grammar school; three multi-academy trusts (MATs); and a foundation trust school. The education phase was evenly represented including primary, secondary, special educational needs (SEN) and other cross-phase settings. Like survey respondents, most recent judgements of school performance (i.e. Ofsted/Estyn outcome) were generally positive across the interviewee's settings and current deficits and future deficit predictions were also similar to the survey respondents. The schools ranged in size with the number of pupils on roll commonly ranging between 200 and 1500, reflecting a range of small to large schools.

Table 2 presents an overview of the interviewees.

<b>Interviewee</b>	<b>Role</b>	<b>Age</b>	<b>In-school experience</b>	<b>Current setting</b>
<b>Jo</b>	Senior Generalist – school-level Fellow ISBL	50-59	8 years	Foundation trust (England) Special School - cross-phase
<b>Jack</b>	Senior Generalist – Trust-level Fellow ISBL	40-49	6 years	8 school MAT (converters) (England) Community/VC Faith Schools – cross phase
<b>Susan</b>	Senior Generalist – Trust-level Fellow ISBL	50-59	17 years	2 school MAT (converters) (England) Community Secondary schools -
<b>Peter</b>	Senior Specialist – school-level Fellow ISBL	40-49	8 years	Single academy (converter) (England) Secondary Grammar with 14-19
<b>Anna</b>	Senior Generalist – school-level Fellow ISBL	50-59	9 years	Local Authority maintained (England) Special School - cross-phase
<b>Stan</b>	Senior Generalist – school-level Member ISBL	60-69	30 years	Single Academy (converter) (England) Secondary/14-19 Community School
<b>Tilly</b>	Senior Generalist – Trust level Member ISBL	50-59	16 years	6 school MAT (converters) (England) Community/VC/A Faith Schools - cross-phase
<b>Trevor</b>	Senior Generalist – school level Member ISBL	30-39	16 years	Local Authority maintained (Wales) Community Secondary school with 14-19
<b>Lucy</b>	Senior Generalist – school level Member ISBL	40-49	6 years	Local Authority maintained (England) Community Secondary with 14-19 School
<b>James</b>	Senior Specialist – school-level Member ISBL	30-39	3 years	Local Authority Maintained (England) Community Primary school with early years

## 6.2 Interview findings: key themes

There was considerable consensus across the interviewees as to the major challenges facing the profession and its future growth, as well as the matters influencing professional confidence and growth. The biggest challenge was perceived to be the lack of status and recognition of the profession, with the majority explaining that, although their role was formally recognised as a part of the senior leadership team (SLT) in their setting, the level of input they were able to have, and how this was received, valued and recognised by their colleagues faced various tensions. The greatest frustration was around how their contributions and input were often not seen to be of equal status to that of teaching-members of their SLT.

This lack of status presented concerns around decision-making in schools especially considering the many responsibilities interviewees indicating their roles held for matters of compliance and resourcing. Much of the tensions around status were felt to be driven by a lack of understanding and knowledge of business functions. Indeed, interviewees all shared many concerns around the knowledge-base of SLTs, head teachers and governors as local accountabilities were felt to be developing beyond the capability of current school leaders in relation to strategy, finance, compliance and organisational complexity.


All interviewees felt that it was important to build strong relationships with SLTs to begin to overcome the apparent status barrier to SBP input. Furthermore, it was strongly felt that head teachers could be crucial allies in enabling business leadership and SBP input at SLT level and across the school or Trust. However, reports of positive partnerships with head teachers were mixed across the sample with some interviewees describing very positive experiences that increased their impact in school, whereas others indicated considerable barriers which had left them feeling frustrated, and in some cases devalued.

The impact of policy reforms, funding and structural change and increasing accountabilities were also raised as key challenges and barriers to the growth of the profession and were often linked back to the issue of professional status and a lack of voice in local matters and at policy level. This was apparent as tensions were raised around capacity and the increasing workload and complexity of SBPs roles in an increasingly diversified structural landscape. This led to discussions around reducing support, the sustainability of roles, redundancy, succession planning and whether to specialise as a current generalist, as interviewees raised the sense of uncertainty they felt was increasing across the profession. In this context, the multi-academy trust (MAT) agenda was often raised and there was a mixture of opinion as to the value of academisation and MATs in England. Some interviewees indicated the potential that new structures could present in creating more career opportunities; however, others reported the local reduction of support, reducing support staff numbers and redundancy issues across their local settings and barriers to input in the development of new structures. Furthermore, several interviewees, including those who worked at a system level, were sceptical of the centralisation of business services and questioned whether this would benefit individual schools in the long-term and felt more investigation was needed across the section through case study reports.

Overall, it was felt that there was much the profession can contribute to schools and local structures; however, tensions around professional status often appeared as a key barrier to professional growth as many interviewees felt their input did not receive the recognition that it should have despite their background, expertise, experience, training and qualifications. It was felt that substantial work is needed at all levels across the sector to raise the status of the professional so that SBPs can begin to contribute more fully as key strategic and operational players in a turbulent and evolving policy landscape.



The thematic analysis of the interview data, which will now be explored, presented the key themes as:

- 
- Professional Status: issues of voice, recognition and inequality
  - Structural reform: the impact of change, policy and funding cuts
  - Capacity, workload and resilience
  - Business understanding in schools and the role of head teachers and senior leaders
  - Role Development: CPD, qualifications, role models and succession planning
  - Summary: Professional confidence and purpose in challenges times

### Professional Status: voice, recognition and inequality

Longstanding inequalities in the school workforce emerged frequently as interviewees shared a common struggle to be seen as equals alongside teaching colleagues, particularly at leadership level. Many interviewees highlighted a 'cultural divide', sharing similar frustrations that 'barriers are endemic in our culture...' as they reflected on 'the glass ceiling of QTS' when reaching more senior positions. A common story appeared around a lack of SBP voice, status and recognition in various matters across their schools with all interviewees feeling that many individuals within the teaching workforce do not adequately understand or appreciate the work of the profession and its role in schools

'Teachers don't actually quite get what you are doing day in day out, so really there is that overall needs to raise the profile of the role.'

'...I know how important the teaching is but without the support structure to go with that you haven't got an effective school...'

'I don't think that people understand the complexity of [SBP] roles.'

Many interviewees reflected on their frustrations of being perceived as 'just admin' finding that their views were sometimes not taken as seriously as other senior leadership team (SLT) colleagues, despite their expertise and background. Many interviewees felt the influence behind this issue of status was a lack of understanding from teaching colleagues of business functions and the value of SBP roles as they highlighted historical and recent experiences of being positioned in ways that had made them each feel somewhat frustrated or under-valued at various points. For example, one interviewee spoke about entering her school as a business manager and the long 'battle' she had fought over her years to gain the recognition from teaching staff that her role went beyond that of a school receptionist. However, despite her efforts and inclusion into the SLT in a more strategic capacity, she stated 'I do have concerns about senior management and how they see my role' after receiving comments from senior staff that she is 'just the 'money' person or the 'budget' person... or well, 'you're reception'. For interviewees with long-standing experience in schools, this journey to inclusion and the barriers that followed were a familiar story despite the growth of the profession over the last two decades

'The role has evolved at a rapid pace in recent years, but I don't feel that acknowledgement of the responsibility of the role has.'

Furthermore, there were several reflections from interviewees about a wider misconception of what the word 'business' means and involves in a school setting, which was felt to be influencing the inclusion of SBP roles. For example, one interviewee stated

'I have had people say to me in public 'what do you do' and I tell them I am a school business manager and they ask: 'well what do you do?' Well, I say 'I manage the business of the school' and then they say 'oh I don't like this idea that schools are businesses!'

Indeed, many interviewees raised their concern that the word 'business' seems to be too often linked with commercial activities and profit-making by those who do not understand school business management and how SBPs work to enable the operation and growth of a school on a day to day basis

'People do react to that word [business] but that is exactly what it is. It's not a business in terms of making money because it's absolutely not about that, but it's a business from my point of view – it's a service provider – and it's probably one of the most important service providers that you can be because you are educating young people for the future so it is a business..'

As discussions around the perception of business, SBP roles and their development unfolded, several interviewees reported that, in the main, they felt that the senior leadership team (SLT) in their school did recognise their role as a formal member and they felt included at leadership level. Indeed, about half of the interviewees that felt that their SLT were inclusive and open to their input and they reported a good level of support and understanding of business management by their head teacher. However, the other half raised concerns around their inclusion to meetings and how their input and decision-making was valued by senior leaders as compared to that of teaching colleagues, which is explored further in a later theme (Section 6.4).

'...when I listen to other business managers and how they don't sit on the leadership team, I do understand that on the whole I am well supported, but I still get that feeling when you are sat in meetings and you might add some of your ideas and thoughts... there is still a bit of a... well – you've never worked in a classroom so what do you understand about it.'

'...support staff... are not of equal status and I think there is a cultural shift needed across quite a large proportion of the teaching profession. But I think where it does work, that's where you've got the head teachers with the different mindset.'

Indeed, regardless of their time in a school setting, or within the education sector - which ranged from just under three years to thirty years - all interviewees shared experiences of struggling to have input into the leadership of their schools often finding their voice was not taken with equal weight as teaching colleagues or they were not included in key strategic planning or key-decisions. The discussion around this tension often returned to the wider perception of the business management function and SBP roles by the teaching workforce. Several interviewees spoke of how they had to ask, push or argue for their inclusion in certain meetings and many highlighted the need to be assertive and pro-active in their roles rather than waiting to be asked or included

'...I said to the head teacher that I wanted to attend the curriculum meetings and I do attend that now and find it quite valuable as I can hear about what different teachers are planning to do in their subject areas...'

'When decisions are made without discussion or involvement from me or considering the implications and there are consequences to then manage, it reflects the lack of awareness about the SBP role. Governance and procedures are often not followed in matters like that; it is not taken as seriously as it needs to be. But it is more about lack of awareness and seriousness of matters and due process... sometimes time is not taken to cost or think about things and there is no consideration of SBP involvement.'

Frustrations around a lack of access and inclusion into the wider school community were often raised. For example, one interviewee stated 'I had never attended a teachers' meeting and things are often decided about the curriculum with resources' and outlined the difficulties this often brought to the budgeting process and how she had pushed for her inclusion which had been accepted and had resulted in a positive impact. Several other interviewees also outlined their efforts to challenge the perception of their role in the wider context of the own settings, however, this appeared to have mixed outcomes as interviewees shared their experiences. Some reported that their efforts had been successful in relation to their SLTs, but many struggled with raising the interest of the wider teaching staff in matters related to business leadership and management

'We are dealing with teachers in the main and they are struggling in their own roles with demands on them should Ofsted come in... I don't think we are ever going to get the rest of the school community understanding or even caring...'

'...I explain to [new staff] what my role is as soon as they start in school ...that is definitely helping...'

'I think other's just think I manage the money and that's it. And that is something I need to address really in terms of marketing what my particular role is. But ...I can't get access to people to be able to do it'

It was also strongly felt by all interviewees that SBP levels of pay, terms and conditions do not reflect the growing accountabilities and responsibilities of SBP roles in relation to their teaching colleagues and members of the senior leadership team (SLT). Several interviewees explained their 'fight' to be more formally recognised alongside other SLT members and have their pay reflected at similar levels

'...it is not all down to pay, but sometimes that is quite a good reference to how you're valued... if you did something drastically wrong, you would have to hold your hands up and say 'I cannot do this anyone as I have lost my credibility' just like any other type of leader ... and it's not so much the money, it is the level you are working at and the responsibility level'.

'The profession is very de-valued in certain areas, so I think that where you have your school business manager sitting on the SLT I think there isn't general recognition that they should be at the same level [of pay as teachers] but I think again that you have to fight for that as individuals and put that case forward'

Despite a sense of growing frustration around a lack of recognition of their input, many interviewees felt that there was much work that could be done to raise the status of the profession from different stakeholders yet understood that this would take time. For example, many interviewees felt that 'teachers often lack an awareness of schools in that wider context and that different roles are needed' with many wondering how matters of governance are portrayed in initial teacher training (ITT) programmes to highlight how schools work holistically. Many interviewees also raised the inclusion of business leadership and governance in training content for school leaders, such as the National Professional Qualification (NPQ) training programmes, and felt perhaps these programmes could be helpful in raising awareness of the profession

'...our deputy head is currently doing the NPQH training, and even though we are so many years after what Estelle Morris said about a business professional in each school, the only time she has asked me any questions about my role, she sort of had to ask me about what I actually do in school yet she has worked here 5 years ...I wonder what is being said in these sort of qualifications about what a business manager does and what strategic input can be given by a business manager.'

It was felt by many interviewees that ISBL had done some important work to promote the role to practitioners, and collaboration with professional bodies, such as the National Association of Head Teachers (NAHT) and the Association of School and College Leaders (ASCL) was felt to be positive and moving in a positive direction. However, interviewees wanted to see increased partnership work across the sector to further raise the status of the profession, such as collaboration with broader teaching unions, the National Governors' Association (NGA), the Department for Education (DfE), as well as more localised work with local authorities, Trusts, Parent Teacher Associations (PTA) and other local groups.

'I am very impressed with the work that NASBM, now ISBL, have embarked on... the competencies framework they put together, but that's the sort of thing that would skip merrily within three seconds from the head teachers desk straight onto the business managers desk without the head teacher actually reading it. But this is about awareness, and it will take a generation to shift the mindset.'

'The NASBM professional standards that came out, it is a great document that explains [the role] but where is that publicised other than in the profession itself. Does anybody know about it outside of the profession? I am not sure they do...'

Other suggestions to raise status included joint networking events for SBPs and teaching-leaders, as well as widening access to training and qualifications across the sector to encourage the inclusion all school leaders, not just teaching leaders, as well as national funding to support this. There was considerable passion and responsibility for the future growth of the profession as each interviewee spoke about the importance of the role and its impact on schools, with many emphasising the need for individuals to help to promote the profession. However, concerns around a growing sense of complacency within the profession were raised, especially by interviewees working at a system level as ISBL Fellows or SLEs. All interviewees reflected on their interactions with others across the sector at events, or in their network groups and all felt there was a need for the profession to become more assertive in demanding equality and recognition. For example, one interviewee with considerable experience in the private sector reflected on the nature of the public sector

'...you shape your own destiny to a certain point and you have to drive it a bit as individuals... but if there's a bit of complacency, which I think there can be in the public sector where people are sitting around waiting for someone else to do it for them... then it isn't going to happen... you are more used to more creating your own pathway and your own shape in the private sector..'

In the discussions around complacency, some interviewees also reported their own sense of fatigue as they spoke about their on-going battle for recognition in the face of growing accountabilities and reducing funding and support. One interviewee indicated having thoughts of leaving the profession due to a lack of professional recognition and inclusion of her role as she felt that her expertise was not valued by the sector but could be better utilised in other areas of public sector; two others also questioned the profession as a long-term career option due to how accountabilities are increasing yet professional inclusion was not, which had left them facing barriers and growing frustrations. However, despite this, all interviewees felt the profession has a valuable role to play in the development of the education sector and were keen to see the profession develop into new and emerging landscapes, particularly in taking a business leadership role as schools increasingly self-manage and local authority support declines. Some interviewees also felt that MAT structures could perhaps offer an opportunity to redress the issue around status

'I wonder if we can get a high-profile SBM to become a MAT chief executive and do some really good stuff as I think that would be a really telling story ...it would take a shift in a governing bodies viewpoint to say actually to run the business we don't need a teacher we need a business-person and that change of mindset, I haven't seen it happen yet anywhere, but I suspect it will at some point..'

Overall, a lack of status and recognition was consistently highlighted a key barrier to the growth of the profession which often led to reports from several interviewees of feeling undervalued and frustrated. This led to concerns around perceived inequalities at senior leadership level as the majority of interviewees felt that their voice and input were received with less value than that of their teaching colleagues. Many interviewees reported the need to be more assertive around their inclusion to decision-making and spoke of their on-going struggle for greater recognition, with some receiving more status in their school from years of work to embed their role at leadership level, however, this was not the story for all interviewees. Matters of accountability and levels of pay were raised as interviewees elaborated on leadership equalities in school, and across the wider school workforce. Many felt the increasing need for various agencies and stakeholders to come together to promote, market, and develop the profession in a variety of ways, from individual SBPs, head teachers, Governors, and their associated professional bodies, and policy-makers

## Structural reform: the impact of change, policy and funding cuts

As interviewees spoke of the increasing complexity and breadth of their roles, they shared experiences of considerable change across the sector and the impact of this on their day to day work

'I feel I am very experienced in doing what I do ...I don't feel incompetent or incapable of doing anything... for the future, it is very uncertain... those policy changes on a national level, if they are implemented, they will have a huge impact on us [SBPs]...'

Many interviewees reported a reduction of support from their local authority (LA) and spoke of the impact of policy reforms, such as the new national funding formula (NFF) policy and the MAT agenda on their schools as they shared the consensus that schools were increasingly having to self-manage and take on more accountabilities despite a lack of appropriate funding to do so

'The LA, they don't do anything for us but with NFF funding they will be holding a chunk back for SEND and other things, which isn't right...'

'...It's the finance... schools need more money... I think it is a big challenge to work more strategically and to make the necessary cuts which schools inevitably have to do because the funding is reducing.'

There was strong consensus that policy reforms are increasing the breadth and volume of business management activities in schools and creating heavier workloads. Those in English schools acknowledged the 'shrinking' of local authority support and the pressure this was placing on many schools to consider joining or forming multi-academy trusts (MATs) in some areas. As reforms brought new local accountabilities, and were influencing new structures, interviewees felt there was a 'diversification' of the profession especially as the variety of structures and roles widens.

'The diversification of the profession, as in the MATs, the academies, the maintained ...schools always had a variety of settings with foundations schools, grammar schools, special schools, but on the whole the business management role you could cover it with one job description... but now it's very diverse. ...'

The school business professional role is changing, you know it's different – there's so many different versions of it now'

There were concerns around fragmentation of the SBP roles and skill-sets required to lead and manage business functions without a clear pathway for those who had been in the profession for some time or those entering from other sectors. Tensions around the historical tradition of the school business manager role as a 'generalist' role and the emergence of 'specialist' roles in the sector, particularly in academies and MATs in England, were often raised. Interviewees shared a common depiction of a 'specialist' role as one that is focused on a specific business function, such as finance or premises management, either at school level or more commonly at Trust level in a 'central service' spread across several schools. However, the 'generalist' role – understood as leading and managing a wide range of business functions – was one that was felt quite necessary to individual schools with concerns around the future of this role in relation to MATs and multi-school structures

'the 'generalist' school business manager role is very much changed ...whether the role will almost disappear in the future because you will have COOs working with finance directors, HR directors, premises director and maybe the school business management role as it currently is will disappear in the future.'

Interviewees held mixed opinions around the MAT agenda in England with many sharing concerns around the future security of SBP roles, particularly the 'generalist' roles in schools, with others acknowledging that larger collaborative school structures, like MATs, could present opportunities for SBPs to grow and upskill. Many interviewees raised the possibilities of a longer-term career pathway, especially for SBPs who were perhaps working at the upper-most level they could within their schools, with larger structures offering progression to higher levels. For example, one interviewee stated 'there are a lot of people who will embrace [MATs] and see career development into COO, CFO roles...' However, the future of 'generalist' roles was at the centre of the concerns raised as there were questions as to how this role would look in larger structures and whether they would survive in smaller schools

'I think a lot of business managers, particularly in primary schools, are worried about their schools forming or becoming part of MAT. I know that they feel very vulnerable..'

Hence, the MAT agenda was viewed with uncertainty in the context of the future security of SBP roles with many interviewees reflecting on how a 'fear of the unknown' is growing across the profession which they felt was driven by uncertainty around the MAT agenda, centralisation of business services and the pressure of funding cuts. However, several interviewees challenged this and felt that there were examples of successful professional growth in multi-school settings. It was suggested that case studies of successful SBP growth through MAT formation should be sought and shared by professional bodies to distil some of the myths and showcase the potential of what can be achieved.

'I think it's fear of the unknown... rumours about redundancies as schools go into MATs and you might not need a business manager in every single school operating to [...] so, it's fear of the unknown in terms of organisational structure... we need successful examples.'

...I would love to speak to a business director of a trust or the COO of the trust ... where it works really well and find out how it works successfully and how they have done that.'

However, redundancy was a tension in relation to the MAT agenda, with three interviewees saying that they felt their role was no longer secure under MAT formation with comments such as 'my role is definitely vulnerable...' and another interviewee having been 'offered a package' to leave, stating that 'other people in my circle are also being made redundant...' Furthermore, where MATs were intending to grow after formation and add further schools, there were tensions around what this could bring if growth does not occur as anticipated

'it has been said to me that as the trust hasn't grown that my job is at risk of redundancy... my job is one that could just be lost... my role has been kind of side-lined [since formation] ...because they do feel it is an expensive role that they could do without and have almost made it so that they can do that.'

Indeed, many interviewees felt that the centralisation of business services across larger structures was the key area of tension driving sector concerns around job security with many feeling that decisions to form or join a MAT and centralise certain business or administrative functions were often motivated by funding pressures and seen by school leaders as a way to reduce expenditure.

'I can see many schools are thinking that 'if we centralise that role and have one business professional for 3 or 4 schools, you save x amount of money by cutting back on that level of support'. But what have you lost in the process? I think that message needs to also go out there as I am quite concerned that otherwise we might start losing the role.'

However, some interviewees felt that the centralisation of services could create positive opportunities for the profession and felt it could be a strategy that could help to improve the education landscape by increasing the sharing of knowledge and good practice. However, it was felt this was only possible if the capacity for growth was carefully considered at the outset strategically and developed through planned transitions

'...if you view centralisation's role as providing a framework in which to operate and aligning process and approaches, I don't think there is anything to be feared in that, I think there is lots to be gained from being part of a MAT that operates that way because that is where you will be able to easily share best practice and better ways of working. You have to make sure you have the right capacity to be able to look after the schools because if you just continually grow and have a small central team, all you will do is de-centralising again and bring back all of the inherent problems that were in the local authority model.'

For example, for one interviewee, the formation of a MAT had been a success story in terms of SBP role security and the growth of her role. This interviewee reported considerable inclusion and voice in the strategic planning of new 'central services' across the MAT and had led the transition of business functions from local level to Trust level without any reduction in staff, hours or support. However, she did also indicate her uncertainty as to how her role would change in the future as the MAT grew, but faced this with a positive attitude based on her recent experiences of change and her status in the MAT

'I don't worry about change. As long as my job is secure, I don't care what I do. Don't reduce my hours and don't reduce my pay but I'll do anything. ...change doesn't worry me as long as I am secure, so yeah I am excited by the thought of it and I know that is the only way to survive going forward in the future'

Other interviewees who had transitioned into a MAT structure had a different story and spoke of how they felt their job had become insecure or found that they struggled to have input into Trust set-up or growth with some indicating they had to continually argue for appropriate structures and personnel. For example, one interviewee had found her role becoming more operational since being moved into a role a Trust level and was finding it hard to lead staff based in different schools

'When I meet with my teams, I am not able to give the direction I previously would have been able to do [before MAT formation]... the niche of the organisation is very much top-down but in my department it is bottom-up as they are informing me of what they are being asked to do ...and sometimes you wonder where the strategy is.'

All interviewees raised the importance of SBP input into structural change in their settings, especially in relation to the formation of trusts, collaborative partnerships and centralised services and how funding cuts, policy changes and increasing accountabilities were influencing the work of SBPs in various structures. However, change management in schools was often reported to be predominantly led by teachers and most interviewees felt that there was not enough consideration of the value the SBP contribution can have. Interviewees felt there was a lack of diversity in perspective with many senior leaders lacking the experience and skills in areas of infrastructure, business and governance, yet were often leading on these matters and not utilising SBP expertise to the degree they could be. This was a point of frustration for interviewees and was felt to increase the level of business risk to their schools



You need different thinkers... if you are always doing what you've always done and always recruit from the same sector you are always going to get the same style of thinking and then nothing moves forward.'

'There seems to be a lack of strategic planning, especially when MATs are formed, and often the SBP does not play a central role or is left out of structural decisions or service innovations. A lack of ability to contribute is too often the story.'

'...people are going to think: 'I can't use my initiative, my ability, my skillset, I will go and look for a job in the NHS or elsewhere' and that would be such a shame.'

Furthermore, several interviewees, especially those in MATs, highlighted issues around power structures, governance and leadership in their settings. A common story across interviewees was that local structures of governance and governing bodies were not always as strong or as challenging as they could be with strategic leadership often lacking as senior teams appeared more operationally focused on the short-term. This was raised as an increasing risk in decision-making around major change, like academisation and MAT formation or merger. Moreover, many interviewees raised the issue of a growing gap in the knowledge and understanding of SLT members in matters of governance, compliance and business in evolving context, particularly in relation to the formation of new structures like MATs

'I think that the multi-academy trust agenda is a huge challenge... if it is governed well and led well that I think it can work but I think there needs to be really strong governance and leadership in place and you have to be realistic as to what the projections are for the Trust'

'A trend in terms of academisation is that the senior team have huge power over their governing body. There's not many governing bodies that stand up to them...'

'Most of the academies that are set up now, which are MATs, are set with a small group of a sub-set of trustees and those 4 or 5 people work very closely with the head teacher or the senior team and they run the show...'

Indeed, all interviewees felt that considerable change across sector in recent times had meant many senior leaders were struggling to keep up with standards and legislation around matters of compliance or did not understand the changing context had left the school more accountable than ever before. Many interviewees questioned the suitability of the traditional role of a school head teacher to head up large and complex organisations where many aspects of compliance sat outside of their skillset, training and experience as educators and leaders of education standards. Furthermore, many also felt that the Chief Executive Officer (CEO) role in a MAT structure was quite a broad role and should focus purely on leadership, direction, growth and overall compliance in a MAT structure, with support from a range of specialists from across different functions.

...the skillset [at CEO level] for me is leadership and purely leadership: it is the motivation and structure of your workforce because it's your workforce that will make it happen so it's about leading them and being visionary. So, I just think it's about being an open minded strategic thinker who responds and can respond to change and be innovative at the same time and can lead...

Overall, austerity and policy reform were felt to be driving major changes to the structural landscape with a reduction in local authority support, increasing local accountabilities and pressures in schools, funding cuts and the MAT agenda in England impacting on SBP roles, workloads and accountabilities. As reform was felt to be influencing the diversification and fragmentation of the profession, views were mixed around new emergent structures with concerns around the future of the profession in the face of such rapid structural change with uncertainty in how to move forward with career development. However, there were strong feelings that there is a key strategic role for SBPs going forward. The consensus was that with more SBP input, along with support for business functions and capacity from the outset of structural change, there were opportunities to create sustainable structures and opportunities for innovation and growth in schools, as well as for SBP career development

## Capacity, workload and resilience

When interviewees were asked how they felt about their workload, comments such as ‘...workload? Well, it’s horrendous isn’t it...’ and ‘...capacity-wise...workload is high...’ featured across all interviews. However, a sense of acceptance of long hours as a ‘part of the job’ often presented along with a sense of the responsibility each SBP felt in ensuring the work was completed.

‘...how many hours do you work?’ I honestly couldn’t tell you but it’s a lot... I’m here early in the morning and I am certainly here long into the night, I would go home and put the kids to bed and then sit on my laptop and do more work... I sleep easier knowing I’ve taken it home and finished things that need to be done... in the school day you don’t get that time to sit and do a task for 2 or 3 hours and see it through due to interruptions and disruptions during that time are huge, but if it wasn’t done it would have a lasting impact.’

The interviewees all highlighted an increase in the tasks they must complete as accountabilities at school level grew within existing structures, or in some cases within a shrinking structure of support sharing concerns of how they, and their teams, are being ‘expected to cope’ and ‘expected to do more work with the same hours...’ Despite this theme of decreasing capacity and increasing workloads, all interviewees spoke of feeling more than willing and professionally able to meet new challenges and tasks, yet were concerned around the sustainability of their capacity for the future, and that of those they lead

‘I am really concerned about the stress on my office team about the continual delegation of tasks coming down from the local authority that we are expected to pick up. ...there doesn’t seem to be the understanding from the leadership group as to what the impact of that it’

Being drawn into a variety of operational matters and facing considerable interruption was reported by all interviewees, who each worked in different types of school, predominately in senior generalist roles. However, being pulled into ‘the detail’ and lacking capacity to work at a more strategic level featured for some interviewees, and at times being ‘front of house’ was a tension for those in smaller schools. However, many interviewees felt that their SLT also needed to become more strategic in their work, particularly in terms of financial planning to avoid ‘having to find funds’ for mid-year budget request, and at times interviewees felt frustrated by the lack of strategic focus and planning which could often cause additional workload

‘I think the frustration that certainly I have, and I know colleagues have, is that you get involved in an awful lot of detail and I think, certainly from my experience senior leaderships teams in certain settings get too involved in the details and I think that is where the frustration is. So, rather than focusing on the strategic, the leading, the driving, you can get very bogged down in broken projectors bulbs and temperatures of rooms and that sort of thing...’

There were also many examples of how interviewees had worked to assert and embed strategic thinking at senior leadership level which, although not always successful, appeared in conversations as an on-going development of their own roles.

'When I took my role, it was a bursar role and operational. Within 6 months I knew that if I was going to get involved in various support services across the school and make improvements, I realised that I couldn't do that and do the operational role so I went to the Head to ask for additional support so I could delegate and look more at the strategic stuff ...and we restructured.'

It was felt by many interviewees that there was unlikely to be an influx of new funding or support to schools, and that pressures from reforms were unlikely to ease, and so many felt the answer to their workload issues were to be assertive in managing themselves, encouraging increased strategic planning and to be innovative and creative in school, especially as expectations on schools to self-manage increase.

'...you need to manage your own workload and be quite innovative and generate money back into a structure that can support you and the school. This adds to workload but ultimately it will pay off for the school if you are more enterprising.'

Overall, despite a sense of change-fatigue from constant reforms and the concern around workload sustainability, all interviewees accepted that a high workload was a part of the SBP role. However, the growing risk to the sustainability and well-being of SBPs was highlighted around increasing stress and the need for more support. Innovation, creativity and enterprise featured in discussions as an increasing core aspect of SBP work as many spoke of undertaking efficiency savings and income generation activities to support their schools. However, it was felt there is a great need to have the right structures of support in place to embed enterprising behaviours that can be of benefit to schools. Hence, there was a sense that workload issues could improve but with recognition that this was only possible if there is understanding across the education sector that SBPs are vital and it is important to protect their capacity from reducing further.

### Business understanding in schools and the role of head teachers and

Interviewees that reported a strong alliance with their head teachers spoke of having considerable impact and success in their settings, however, those who reported a challenging alliance spoke of their struggles to have impact and presented a more negative outlook for the future growth of the profession. Where head teachers and SLTs were described as 'strategic', forward-thinking', 'inclusive' with a strong understanding of business matters and SBP functions, there were stories of impact, success, growth and opportunity for the future. Where these elements were lacking, there was 'frustration', 'concern', and 'risk' to school improvement and structural arrangements.

'In my new school I am privileged to have inherited a leadership team in the school that recognised the importance of business management & strategic leadership and it has increased my confidence as a result in carrying out my role'

The alliance between head teachers and school business professionals appeared to be influenced by the level of the head teacher's understanding of school business functions and the potential that SBP roles can have in adding value to schools. Indeed, the head teacher role was often cited as playing a crucial part in embedding the SBP role into the senior team and influencing the status of the role within the SLT.

'...a good relationship and support from the head teacher and chair of governors is vital for SBPs'

'...[my role] is completely understood [by SLT].. 'I sit on the senior leadership team to ensure that every decision we make as a school has a business reality or perspective. Otherwise it's too easy to make some decisions in school without having a financial reality check at some point.'

'Sometimes I do find that meetings have been held and I have thought I really needed to be there or put some financial input into it... it doesn't happen often as I have a good relationship and support with the head teacher'

However, despite most interviewees identifying as the senior business professional in their context, some were not SLT members and many interviewees reflected on their journey of 'fighting' a long 'battle' for acceptance and recognition as a credible member of the SLT. However, as highlighted in earlier themes in this section, most interviewees reported challenges of being accepted at a senior level, raising tensions around their input being either 'ignored', or 'side-stepped' or not taken as seriously as other SLT colleagues

'A point of strain, and it's probably a universal thing, whereby if you are the guy who is having to say no, then you become an obstacle and that has changed quite a lot. So I have found myself in the last year or two being cut out of discussions. ...that become a source of tension as in 'he is the guy who is going to say no so we won't ask him.'

'When I hear something has been done and the implications or long-term outcomes of that decision have not been considered, ...it's quite frustrating when procedures, and governance, isn't followed.'

Although all interviewees stated some form of attendance at governors or trustee meetings, this was varied from observer roles at full board meetings to advisor roles in committee meetings. However, the support of governors and trustees for the school business function was highlighted as important by all interviewees. Indeed, several SBPs highlighted how a good partnership between the chair of the governing/trustee body, and the lead finance governor, along with a strong alliance with the head teacher, can be extremely beneficial for the sustainability and development of the school's vision, and for the development of the SBP role.

'I have good support from the head teacher and what also helps is a good relationship and support with the chair of governors'

However, across the different settings the interviewees represented, they all shared their growing concerns around increasing accountabilities and the knowledge-base of senior leaders in relation to business leadership which was felt to be a key barrier influencing the lack of recognition raised. From those who had been in the sector for more than eight years, there were many reflections of times when funding was more abundant, local structures were less diverse, and local authorities offered more support or were there to 'bail out' struggling schools, which was depicted as a stark contrast from the current context

'...it's only in the last few years that it is really beginning to bite that we haven't got enough money and actually head teachers don't know how to operate in that environment because they haven't had to operate in that kind of environment before.'

...[there's] an age profile for head teachers whereby they've never had to deal with this stuff in their career and all of a sudden they are starting to have to deal with business aspects...'

Particularly, a lack of understanding of strategic financial decision-making, governance, risk management and legislative compliance in an increasing climate of accountability were common concerns across the interviewees. The five interviewees holding ISBL Fellowship shared considerable concerns around the lack of business understanding of senior leaders highlighting it as a sector wide risk, particularly in terms of strategic financial leadership, business risk and legislative compliance.

'When I arrived in post [as SBP over 5 years ago], I was quite shocked actually at head teachers knowledge of absolutely basic things like HR, public sector finance rules, compliance rules for premises ...and I arrived and said 'you can't do this, you can't do that!' and to start with you are seen as a little bit of a handbrake because you are seen as a bit of a bureaucrat, but actually all you are trying to do is bring them up to speed with what is actually employment law and what is actually health and safety law and that there are certain things that you have to comply with.'

All interviewees spoke of their concerns around the developing state of the sector and the current knowledge-base of their senior leadership teams and teachers around school-wide compliance matters and felt there were short-comings that needed to be addressed in an increasingly self-managed school system.

'Head teachers haven't been trained in business management ...I think this is a big failure at middle leadership level because you'll find that when someone gets to head of department level, they've never had any interaction with the budget and they've never had interaction with governors...'

'...you look at head teachers, and I look at my executive head – and as good as a manager and leader as he is within his context – he just doesn't have the experience and the training interventions along the way to give him the skillset to understand where we are heading...'

This knowledge-base and training of head teachers was an increasing point of concern for many interviewees in relation to large and complex school structures, like MATs

'I wouldn't presume to question the ability of [the head teacher] to run a secondary school, but when you start to get to the proportions of [growing a large MAT], [the head teacher] evidently does not know how to run an organisation of that size; he is not familiar with the accountability and the structures that will be required...'

This perceived knowledge-gap was felt as often leading to increased worry and concern in-school about the sustainability of activities, especially in constrained financial climates, with all participants speaking about how much time they spent working on balancing the school budget, but also worrying about its sustainability

'Our budget is very tight and because my principal doesn't understand the budgetary constraints within which we are working and she will make decisions without consulting me... it gets harder and harder and it means that for 365 days of the year I now worry about the budget, whether I am in school or out of school; I am worrying about the budget all the time and I do not have a principal who understands what I am worrying about'.

Despite the stress and worry highlighted around budgeting, most interviewees felt they can manage their current duties and presented a sense of confidence in taking on current challenges and initiatives. Indeed, all interviewees presenting as agile and adaptable professionals. However, a sense of future insecurity presented across the sample to varying degrees with the lack of business understanding and recognition of the contribution of the SBP role an underpinning factor.

'I think more training for head teachers on the [SBP] role and its impact is needed... there is an expectation that you can water down that role across schools and that it can still work and my view is that you still need a business manager sitting on the SLT in each school and actually understands the working of that school...'

For several interviewees, the tensions around business and its understanding in schools had meant a 'need to be assertive about their involvement' in decision-making and business leadership in school as well as driving the profession forward and challenging barriers. Indeed, despite the frustration at school level, several participants spoke of looking externally to their schools to the wider profession and their networks. Many accounts of local support, mentoring work and national representation were offered by interviewees of how they had bolstered their confidence and sought opportunities to grow the wider profession through networking, taking on system-level roles or coaching other SBPs. However, the frustration of working with senior leaders who do not understand the value and input of SBPs was taking its toll on some interviewees; one Fellow was considering leaving the profession after seventeen years and another had taken early retirement and spoke of struggling to see the school business profession as a long-term career option for younger SBPs.

'I haven't got any doubt in my professional ability to be competent in the role, but I think that you can't be competent in isolation and not knowing what the direction and strategy of the trust is, it is impossible to do that. ...I have been giving this a lot of thought recently and I think I would possibly want to go completely outside of education'

Overall, the role of the head teacher was presented as a key ally to SBPs with a strong partnership seen as a vital asset to schools and the growth of the profession. However, experiences were mixed with two contrasting stories appearing: the first, a strong partnership resulting in considerable in-school impact, contribution and professional growth; and the second, a lack of appreciation, recognition and value of the SBP role and the impact it can have, often resulting in frustrations around a lack of contribution, stress and worry over job security and the school's financial health. The underpinning factor common between these stories was the level of knowledge and understanding of business management functions, the leadership of business and the value of the SBP role by SLTs and head teachers. In the experiences offered by the interviewees, the head teacher role presented itself as both a key enabler and potential barrier to the professional confidence and future growth of SBPs. Head teacher as allies thus appeared as a strong theme, with a strong alliance and trusting partnership continually expressed by interviewees as key to the future growth.

### Role Development: CPD, qualifications, role models and succession planning

As earlier themes in this section have highlighted, particularly in discussion around reform across the sector, the changing nature of SBP roles was a key challenge and concern to the future growth of the profession across the interviews. In discussions around increasing accountabilities, local structural changes, funding issues and new policy initiatives it was clear that, as new requirements develop, school-types in England diversify and local authority support diminishes, this has driven a sense of fragmentation across the profession as various SBP roles and specialisms emerge alongside the traditional role of the school business manager.

'There is more diversity of roles now and this means: diversity of needs, diversity of structures, diversity of expectations, yet there is still this mindset about the profession and its status across the wider education sector'

It was felt that the lack of status of the profession had influenced a lack of focus and investment from policy-makers and the wider education sector on professional development and career-pathways for SBPs, which was felt as increasingly necessary given the changing expectations placed on schools and the need for sustainable structural arrangements. Although it was acknowledged that much work had been done by professional associations in the sector, it was felt there was a still long way to go to raise the status of the profession across the sector, with a key role for individual SBPs to play within that

'Information about our roles being circulated through the different channels through things like ISBL, ASCL, NAHT but we also need to take responsibility as a profession ourselves don't we. We need to recognise each other [...] we need to support each other and promote the profession...it's all about us helping each other'

'ISBL have clearly mapped a career pathway and the qualifications you might need to achieve that career pathway so that is fine for your high-fliers who are very self-motivated. But what do you do with all those other people who are not that motivated to develop themselves, what is the role going to be for them in the future? I think, to a degree, individuals have got to take responsibility for themselves?'

As noted earlier in theme 6.1, a sense of complacency within the profession was highlighted by many interviewees in discussions around the status of the profession, as demotivation, a lack of voice, and change-fatigue appeared in discussions. However, many interviewees felt that part of journey to raise the status of the profession had to come from within the profession itself, yet many interviewees – especially Fellows and those working at a system level – felt there was often a confidence issue and a lack of assertiveness to drive this

'I think there has been a tendency for business professionals to think that somebody else needs to solve my problems, somebody else needs to get me on the SLT, somebody else needs to solve the fact that they I don't get paid enough... but what are they doing themselves?'

Despite this concern around complacency, there was great appetite for growth across the interviewees as they spoke of their own strategies and how they have sought different opportunities to raise the profile of the profession and contribute to its development in-school, locally and nationally.

'...you have to have a vision for your own career development and understand the pathways that are open to you; mentoring, case studies and steering groups would be very helpful when reaching a career cross-roads'

Tensions around the confidence in challenging school leaders was raised earlier, however, there was a strong agreement that the SBP role needs to be a critical friend to colleagues in school by assertively and constructively challenging situations, decisions and practices and asking questions

'Not being afraid to ask the questions, not being afraid to engage support and expertise where you know that you need it and then you learn from your experience [...] knowing where your weaknesses or lack of knowledge is and making sure you've got things in place to support and develop that...'

Indeed, all interviewees spoke of how they had sought to continually develop themselves no matter their career length or amount of experience in schools. Continuous professional development (CPD) was a frequent topic, not only highlighted as an opportunity to develop career opportunities, but also as a 'given' requirement of what constitutes a 'professional'. Indeed, it was felt by all interviewees that the onus must be on professionals to keep learning, sharing and building knowledge and furthering the interests of the profession across the sector.

'You don't stop learning ... from a CPD perspective, for me, it is about external engagement. My CPD is absolutely focused on making sure that I'm not just looking inwards to my organisation. ...For me, that is my CPD, so national conferences and local business managers groups...that is really how I mostly keep up to speed...'

Networking was especially considered to be a crucial aspect of the SBP role and an increasing core part of career-development.

'...networking gives you confidence as we are in quite isolated in our roles in schools and what is happening in your school is happening elsewhere and sharing good practice gives confidence to look for solutions to a government agenda, share good practice again'

Indeed, all interviewees, felt that networking and engagement with others across the sector through knowledge-sharing platforms, such as local SBP groups and national events, are vital and that all SBPs should invest time and resources to further their knowledge, share good practice and give voice to debates that can influence structural arrangements and national policy

'...get out there and see how different kinds of countries and different people and different areas do things differently is vital ... it just opens your eyes to managing people so much better.... I think it's important to have that experience... I think the sharing of experiences and good practice, or even sharing bad practice, is incredibly worthwhile...'

As the conversations around CPD turned to qualifications, all interviewees held business qualifications and/or bespoke school business or finance qualifications, with some considering undertaking more. However, in the main, most interviewees felt well-qualified and their CPD efforts appeared more focused at maintaining and developing their wider contextual knowledge and managing the impact of sector reform in their own settings through networking and knowledge-sharing activities

'As a business manager in a school and it might be isolated but there are quite a framework of qualifications behind my role that I can draw on.'

'CPD... it's just getting out there. I think that if you just stay in school in your office all day everyday then you are not going to develop... you need to get out there and see people, speak to people, not just kind of in the schools close by, you need to go much wider than that... the [ISBL] national conference, ASCLs national conference... subscriptions...'

Furthermore, it was felt that despite the considerable development of bespoke school business management qualifications during the last decade, the momentum feels somewhat lost with the diversification of the profession and there was concern that some of the long-standing historic qualifications were at risk of being devalued. Current offers around general school business management qualifications were also questioned as to whether they would continue to be fit for purpose and valued in the future school landscape.



'...how the whole professional area is moving, especially with the academic qualifications, is a fantastic step. I just hope it continues... and [that] it doesn't just stop... the previous [C/DSBM] were a stepping stone and suddenly that was it, it was done and it was finished... the funding was cut and everyone was sort of I expect left as to continue on their way in life with no career path, with no... you know - how do I get better at my job.'

Across the sample, many felt there was a lean in SBP recruitment towards financial qualifications and specialist roles in finance, with all interviewees agreeing that clearer guidance was needed around the 'generalist' and 'specialist' debate with clarification around the different pathways and qualifications required across the sector. Indeed, several interviewees felt a sense of uncertainty and insecurity in their roles due to their more generalist background and qualification base. This led to debates about whether to undertake further qualifications and training as a way to sustain a career within the sector and achieve better career-progression

'There is a part of me that wishes that rather concentrating on school business management qualifications that I had actually studied accountancy qualifications because I think in large Trusts that seems to be the it's moving... but what I loved about my job previously was the variety, dealing with finance but dealing lots and lots of other things and I don't know whether for me to go down the finance director route is the route I would particularly want to go down at this stage in my career. I think it is quite a difficult time for the school business management profession.'

Yet all interviewees, including those more recently joining the sector, felt that contextual experience was extremely valuable and those that identified as specialists, mostly in finance, recognised their own knowledge-gap and need to upskill as they became exposed to the other school business functions, with some speaking of the work they had needed to do to increase their knowledge-base around health and safety, premises matters and people management

'...It's the site side of stuff, the health and safety, that has been hard and that's just because I don't have experience in it so it is a lot harder for me to understand. If I don't have experience, you don't know what you don't know. So, when you feel more responsible for something you feel a lot more vulnerable.'

Indeed, there was debate across most interviews around the growing diversity of the sector and the transferability of SBPs between contexts, school-types and phases, including between England and Wales

'...the gulf is really growing I think, some aspects of the job – certainly for people who did this job in Wales before – the skills you had could transfer to any school whereas now it would be very difficult for somebody to go from a Welsh school to an English school in the academy sector as it's just a different ball game really.'

Hence, there was considerable consensus of the unique nature of the school context and the need for bespoke and contextual forms of professional development. This was felt to be important alongside qualifications that were transferable and sustainable as well as understood and valued by the entire sector and the school leaders who are recruiting SBPs as many felt that finance qualifications were now preference yet only covered part of the role in many cases. Qualifications were also felt to be privileged over contextual experience, yet all interviewees felt this was not necessarily a positive way forward for the sector as both were seen as equally important.

“...being a school business manager has a certain skillset that is probably developed... I certainly haven't got it as I never developed through that role from receptionist to administrator to school business manager. More schools look for professionally qualified as opposed to experienced individuals who have gone through from floor-up, so you will lose that something that makes schools what they are..’

Furthermore, all interviewees spoke of the considerable people management responsibilities they had within their settings and all were line managers of other staff, ranging from small teams to a large and varied workforce across multiple schools. This was raised as a particularly important area of development in uncertain times as funding cuts, structural changes and local authority change was impacting on workforce relations, redundancies, staff expectations and conflict

‘there is a lot of conflict in the central services team due to bringing so many different people in different schools together and to manage a transition like that requires excellent conflict resolution and people management skills; I am having to negotiate conflicting expectations and demands and more and more time is spent on managing people problems..’

As many interviewees raised increasing complexities in people management, it was highlighted that CPD and training was needed to help SBPs at all levels develop and improve people management and leadership skills, along with conflict resolution, and training to develop resilience and assertiveness.

‘I have had to work on being firmer and more assertive, but I need to be more resilient with it – with the emotional side of managing people – I need to develop my people leadership skills’

‘...I don't necessarily see anything in [SBP articles] that talks about managing people and... I can't think about a recent article, that talks about managing people..’

However, despite their concerns and fears around the uncertainty facing the profession, all interviewees felt that the profession has a great deal to offer to the sector and there was a considerable appetite for more strategic involvement present across interviews. This was in addition to a desire to contribute to development and change within their settings and to wider sector debates. The importance of role-modelling and succession planning across the profession were also highlighted throughout the interviews as an important but often under-emphasised area of work for SBPs, particularly in the context of discussions that featured concerns around increasing accountability, workload, breadth of knowledge, stress-levels and the need for professional increasing resilience and a focus on well-being

‘I don't have natural successors ...the interesting thought is: do I make my role look attractive? Do people that I work with only see the really long hours and think [I am] always stressed..’

Indeed, in terms of succession planning, there was a debate as to whether the school business profession is the sort of career that others might consider or aspire to as a career choice. Questions were raised around how it can be promoted as a long-term option for those who come into entry-level roles in schools and develop through the school to a senior level, in addition to those entering a 'second career' as specialists or generalist from other sectors. Furthermore, as there were concerns that the profession is under-valued, role-modelling a variety of SBP roles, functions and contexts was thus felt an important part of raising the profile and status of the profession at all levels to inspire professionals to consider different pathways for their own career development as well as create opportunities for individuals to mentor and coach others

**'... peer trust and the recognition of your work from those in your sector encourages confidence and allows greater opportunity to share what you are doing and to help others'**

Wider knowledge-sharing platforms and networking events for a range of school leaders without segregation between teachers and SBP were also felt to be key strategies to improve professional status, confidence and growth. It was also strongly felt by most participants that the profession needs to invest in mentoring schemes and coaching networks, with much reference to the importance of Fellowship, the need to increase the number of Fellows and a focus on schemes that help to coach SBPs towards Fellowship. Indeed, ISBL Fellowship was seen by all interviewees as a key enabler to the growth of wider profession through advocacy and sector-level work in addition to supporting other SBP with career development.

Overall, the diversification of the school landscape and policy reforms were felt to be creating a variety of roles and needs across the profession. This presented challenges around career-pathways, CPD and qualifications and their credibility and transferability across the school sector. The need to specialise or not and the future of the generalist role were highly debated, and it was felt more clarification and support was needed by policy-makers and professional associations to map out career pathways and routes and embed the value of existing qualifications and experience levels as well as advocate for new developments. However, a key role for individual SBPs was strongly highlighted with much to be achieved through local and national networking and participating in knowledge-sharing platforms, mentoring programmes and role-modelling professional standards and values.

### 6.3 Summary: Professional confidence and purpose in challenging times

Challenges to the profession and its future growth was raised by all interviewees. This included concerns with the status of the profession across the school sector due to continuing struggles around the value of SBP voice, and credibility in school despite the considerable experience, qualifications and expertise held by interviewees. There were also considerable concerns around the increasing diversification of the profession under policy reform, structural developments, funding cuts and the growing expectations on schools to self-manage yet a lack of recognition to how this is influencing business leadership at school level and the role of SBP as workloads increase, structures change, and accountabilities grow.

Furthermore, inconsistencies in the level of business understanding in schools and the recognition of the contribution of SBPs was also an increasing concern with all interviewees highlighting the importance of the Head teacher role as an ally in enabling SBP impact and contribution. However, yet a mix of positive and negative experiences were offered around the inclusion and value of SBP roles and their input in schools, especially at leadership level. Role development was also a challenge to the growth of the profession as interviewees highlighted concerns around the availability and accessibility of CPD and the transferability of qualifications across contexts, raising the need for role models, mentors and an increased focus on career pathways and succession planning the wake of sector reform.

*'Professional confidence ...is knowing that you are contributing and that you are having an impact and influence on the education setting - and you know you are having an impact - you've got the knowledge, you've got the skills, you can make a difference and I think it's having that drive to move it forward and not sit around... and If you feel strongly about something you usually are right and it is having that confidence to keep on that journey'*

Despite all of the challenges presented by interviewees, most presented with great confidence in their professional capability. However, they all shared a range of concerns for the future around their capacity and ability to grow and develop in such uncertain times. Although the impact of the challenges they highlighted had influenced some interviewees perceptions of the profession as a long-term option, generally, there was considerable passion for the growth of the profession and the contribution that it makes to schools

*'We can do the best things in the world, but if the children don't see or feel the impact of what we do then it's pretty pointless doing it. ...in reality that's what we are all here for, regardless of what role you play...'*

*'It is a great job because you are working with children at the end of the day ...children are benefiting from your work and actions even if you aren't on the 'frontline' so to speak.'*

Indeed, all interviewees spoke of the purpose and impact of their roles, which often highlighted the unique contribution and increasing potential that the profession has as a key player in the developing education landscape

*'I love the fact that, although I don't directly change what happens in children's lives, but that what I do in the background does change children's lives.'*

**VIEW REFERENCES HERE**

**VIEW APPENDICES HERE**