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# ISBL School Business Professional Workforce Survey Report 2020



## Foreword

Over the last ten years, England's education system has endured some of the most radical reforms in modern history.

The school business leadership (SBL) profession has had to adapt to this ever-changing and rapidly evolving landscape. Since the heyday of the National College (formerly NCTL) in the mid-2000s, the scope of role and the number of iterations is almost unrecognisable.

Over a decade has passed since the National College conducted the last survey into school business practice; it is therefore time that the Institute of School Business Leadership (ISBL), as the dedicated professional body for school business practice, should conduct deep and meaningful research into the current profile of the SBL workforce, the challenges it faces, and any barriers to professional development and career progression.

**ISBL exists to provide the sector with confidence in the SBL workforce whilst also providing practitioners with professional development support and professional recognition. This is all underpinned by nationally recognised professional standards grounded in best practice.**

In order to ensure we respond to these key aims, it is essential we achieve a better and clearer understanding of the professional community we serve. Findings from this survey will help inform ISBL's future strategy and the services we provide and will help shape CPD content and delivery. The survey will also provide a much clearer picture of the school business professional (SBP) workforce, not only in terms of its demographic characteristics but also a basis from which to respond to the developmental and structural needs facing both the profession and education sector at large. Additionally, we hope key stakeholders, including the Government, will use the findings to help inform and shape education policy.



**Stephen Morales**

**CEO ISBL**

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# Acknowledgements and independence of findings

The ISBL SBP workforce survey 2019 was fully reliant on the combined efforts of project partners working with the ISBL office team.

Thanks are firstly extended to Qa Research, in particular Helen Hardcastle, John Lillie, Paddy Norris and the dedicated team of CATI interviewers who provided the basis of the telephone-based survey data. Helen Hardcastle provided project oversight and direction within Qa and worked tirelessly with ISBL to ensure that the project was delivered with care, with independence and on time. Paddy Norris managed the call team and ensured the survey was correctly relayed to them. John Lillie provided all data analysis and so the independence of findings and basis for insight development.

Thanks are extended to the insight development team: Dr Paul Armstrong, Dr Fiona Creaby and Liz Wood. Their combined expertise, based upon advanced working knowledge of the sector, was invaluable and provided to the ISBL office team the independence of those insights. All three sector experts worked on this project independent of their other roles in the sector.

Thanks must also be extended to the ISBL office team: Bethan Cullen, Stephen Morales, Leanne Kelly, Liam Walker and Helen Wesson. Helen Wesson led the work on the project, and, as a team, the group were responsible for financing the project, survey development, working with the aforementioned partners, marketing, report drafting, proofreading and finalisation.

Thanks are also extended to Paul Quinn at Zube Creative for the design work on this final report.

## Biographies

**Dr. Paul Armstrong** is Lecturer in Educational Leadership and Management at the Manchester Institute of Education, University of Manchester. His research focus is on contemporary forms of educational leadership and management, particularly the means by which schools are managed and resourced organisationally. He has worked in educational research for 15 years on a range of national and international projects across several areas of education including school effectiveness, school improvement, school collaboration, educational leadership, management and policy. He is a trustee of the Institute of School Business Leadership (ISBL) in England.

**Dr Fiona Creaby** (EdD, FHEA, MSc, CMBE) specialises in leadership development, business management and organisational behaviour. She has over 15 years of management experience across non-profit and public sector contexts, including state schools, healthcare, and social enterprise charities, and has held several senior management roles. A former school business manager, Fiona is an experienced leadership consultant, school sector advisor and is currently a senior lecturer at Manchester Metropolitan University specialising in leadership and management. She holds Fellowship of the Higher Education Academy and is a Certified Management and Business Educator.

**Liz Wood** was a researcher in the International Educational Leadership Centre at the University of Lincolnshire and Humberside investigating the role of bursars in schools. She has published articles and presented conference papers on the topic. She completed the centre's MBA in Education Management for bursars and her PhD studies were concentrated on the emergence of new professions taking bursars as a case study. She was also a tutor on the MBA in Education Management for bursars and published 'From Bursar to School Business Manager' in 2000.

## Executive summary

The ISBL school business professional workforce survey 2019 has provided evidence in support of our hypotheses and has also revealed important new information about the SBL workforce.

It will perhaps come as no surprise that the profession remains a predominantly female community. In relation to the broader society conversations around gender imbalance in senior leadership and the gender pay gap across the general workforce, the survey offers favourable findings in terms of the proportion of women in senior roles. However, there are nuances that suggest we may need to look more closely at imbalances in areas of strategic participation and pay, which we will pick up later.

In terms of ethnic diversity, there is significant imbalance. As a profession, we need to develop a much broader appeal to the diverse communities we serve, and our professional community should better reflect the make-up of our schools.

We have an ageing workforce profile, and as a sector we must begin to think strategically about succession planning. We need to make the profession more attractive to undergraduates and young people contemplating apprenticeships. Existing practitioners and education leaders more generally need to begin to identify talent in their own institutions, local networks and indeed HEIs, ensuring the development and communication of clear career pathways.

Involvement in CPD activity and workload are intrinsically linked. In an environment where budgets are tight, LA services have been reduced but high-stakes accountability has increased, there remains limited capacity, demand and appetite to invest in professional development. The research suggests that structural reforms have had a significant impact on the school workforce deployed to the business leadership function.

We therefore need to find a better way to ensure that school business professionals are given the time and space to develop as managers and leaders and to ensure that the demands being placed on them are reasonable, proportionate and sustainable. It appears that there remain significant and unreasonable differences between contracted hours and actual hours worked.

However, those who are carving out the time to invest in their own development are progressing their careers at pace. The findings suggest an important relationship between those who have negotiated the time and funding to engage in ongoing CPD and the positive career advancement they have enjoyed as a result. The full potential of our professional community could perhaps be more quickly realised if we could assist practitioners to move further and more quickly up the qualification ladder.

Participation at a strategic level is mixed. Some practitioners enjoy a significant role and many enjoy partial inclusion in senior leadership discussions; however, a significant number are still not included and therefore operate without the insights an SLT role could afford them and likewise they could afford the SLT.

Pay disparity overall continues to be a concern raised amongst practitioners across the sector, and again the findings suggest these concerns are legitimate. Seniority is not always accompanied by commensurate pay. The lower end of ranges afforded to school business professionals is of particular concern where salary levels in some cases are lower than the national average wage (Office of National Statistics, 2019) and so may more closely resemble those of a junior administrator than a business manager or leader. There also appears to be evidence of some gender pay disparity, but this needs further investigation given that most respondents were female.

Overall, this survey sample of 939 practitioners has provided us with a much clearer picture of the challenges and opportunities facing our professional community and better equips ISBL to develop a positive response. The recommendations in the Discussion section outline the start of those responses.

## Section 1: Introduction

In 2001, Estelle Morris, the then Secretary of State for Education, pledged to train 1,000 bursars by 2006. The announcement launched a movement across the school system that was referred to as the third “quiet revolution” in our education system. Few could have imagined that by the end of that decade there would be more than 10,000 trained SBPs serving the state sector.

In 2011, Southworth published the impact findings of the school business manager (SBM) demonstration projects and the training developed by the National College. The results showed the significant impact SBMs were having on school operations (Southworth, 2011).

In more recent times, the Department for Education (DfE) introduced the SBM Primary Cluster Grant initiative in 2015 to have, in some cases for the first time, access to a school business manager across clusters of schools. Each of the 62 clusters received a DfE grant to fund access to an SBM across a cluster for typically 12 months. Early in the life of this initiative, the 62 clusters were on target to make combined savings in resource management of c. £2.3 million (NASBM, 2015). This, in combination with the fact that the clusters estimated further post-project gains, means the savings far exceeded the initial funding provided by the DfE, thus providing further evidence in support of the SBP role as critical to our system.

Five years ago, Charlotte Woods then referred to a role increasing in complexity, the increased use of business language and new demands on schools in a marketised system whilst SBPs were still struggling to assert themselves as credible leaders and coequals amongst other senior pedagogical staff (Woods, 2014).

More recent research considered the individual-level factors of professional confidence and identity (Armstrong, 2016) (Creaby, 2018). The research drew attention to a growing professional confidence tempered by the uncertainties of an aggressive reform agenda.

It has now been close to a decade since the Southworth report was published, and whilst stakeholder organisations have conducted surveys with their own members, findings have not been a true reflection of the national SBP workforce. This survey draws participation from the entire sector, both members and non-members, including every phase, school type and region. As a result, this is arguably the most significant school business leadership survey since the 2011 publication.

This new exploration into the SBP workforce initiative is important as the sector grapples with ongoing change and increased complexity as reforms take hold and our system continues to evolve.

It is important to have up-to-date relevant data to ensure we have an accurate picture of our workforce and the environment in which they are operating. Indeed, research-informed decision-making is reflective of ISBL's evolution over the last few years, and the findings will provide a much clearer picture of this diverse profession and help us to respond effectively to the needs of the community we serve.

## Section 2: Methodology

### 2.1 Survey aims and design

This research employed a quantitative survey approach to learn more about the school business professional (SBP) workforce within English schools. The aim was to understand the size of the sector and the scope of roles.

The 31 targeted survey questions were developed by the ISBL executive, the ISBL policy, research and resources lead officer, and three sector experts from the academic community (see Acknowledgements section).

The survey builds on previous research in the sector (Creaby, 2018) and ISBL member surveys encompassing items across the following areas:

- Demographics (age, gender and ethnicity)
- Previous career/experience
- Current role title, remit and focus
- Working hours (contractual v actual)
- Salary
- Inclusion in SLT and governance meetings
- Qualifications
- Awareness of ISBL and Professional Standards
- School type and phase

### 2.2 Sampling and data collection

A self-selecting sample was generated via a range of communications including newsletters, flyers and through social media resulting in an initial 689 responses to an online version of the survey. A further 250 survey responses were collected via telephone calls undertaken by Qa Research.

ISBL provided Qa Research with the required additional sampling quotas based on school type and phase (see Appendix 2). These quotas were calculated using statistics recently published by The Office of National Statistics (2019) and the DfE (Marchant, 2016).

This voluntary survey has resulted in 939 responses. This indicates a very healthy level of participation when benchmarked against comparable surveys (e.g. DfE, 2019) and smaller SBP surveys that have focused on closed membership groups.

## Section 3: Key findings (overview)

The research surveyed 939 school business professionals in a representative sample drawn from online and telephone-based surveying.

- In relation to **sample diversity**, the overall results suggest a female-dominant sample (Figure 3.1), predominantly aged 45–54, with a quarter of respondents within ten years of retirement age (Figure 3.3). The sample was almost completely white, with only 4% drawn from other ethnic groups (Figure 3.2). This has implications for the diversity of the business leadership.
- The findings on **sector mobility** suggest a healthy pipeline, with senior generalist roles having a presence across different settings (Figure 3.5). However, there was a sense of inertia amongst longer-serving respondents, who were less likely to have moved roles/school (Figures 3.10–11). Those respondents entering the sector as a 'second career' predominantly came from administration, banking/finance or local government, with many motivated to enter the sector for either career development (31%), better working hours (24%) or a desire to work in education (21%) (Figure 3.8).
- An **analysis of 'contracts'** (working hours, contract type and salary) presented a trend of respondents working above contracted hours (Figure 3.27) and a lower-than-national-average salary across the sample. This has implications in terms of wellbeing, work–life balance and attraction and retention of diverse talent into the workforce.
- The findings on **qualifications/CPD engagement** highlighted a range of CPD engagement and qualification levels; however, a dip in Level 5 and Level 7 qualifications (Figure 3.35) presents implications of a knowledge gap in certain areas.
- The analysis highlights an encouraging level of **strategic participation** across the sample (Figure 3.39), yet nuances appear that influence strategic participation, such as matters of role focus, school type, perceived value of the SBP role and gender, highlighting some room for improvement. The analysis suggests that half of all respondents' report having no involvement in **coaching and mentoring activity** (Figure 3.38).

The full results are provided in Appendix 3.



## Section 4: Discussion

This section highlights the key findings under each area:

- 4.1 Sector diversity
- 4.2 Sector mobility (incorporating movement in the sector and in-sector mobility)
- 4.3 Contracts, workload and pay
- 4.4 Qualifications, CPD, engagement and role
- 4.5 Strategic participation
- 4.6 Coaching and mentoring
- 4.7 Next steps

### 4.1 Sector diversity

From the data collected on gender, ethnicity and age, aside from the high proportion of female respondents (87%) and an underpinning trend of middle-age across the sample (Figure 3.3) and the implications of this to career progression and the SBP pipeline, there were interesting nuances in relation to gender and ethnicity.

#### Gender and business leadership

- This research reflects the wealth of female talent and is a positive aspect for the profession to take account of, showcase and celebrate.
- The research suggests that the notion of the 'glass ceiling' may be less apparent in this sector given that a higher proportion of women occupy senior roles than the averages across other professions.
- Nuanced imbalances presented across the data, however, suggest gender could influence various career aspects such as: role focus/job title; setting; line-management; contract; salary; qualifications; and strategic participation.
- The gender pay gap is reported to affect women over 50 more considerably than women under 40 (Crown, 2017), however this was not apparent from the findings gathered for SBPs.
- The closest-matching UK occupation (local government administrative) in the 2019 pay gap is reported as 12.1%. Women are 74% more likely to hold these kinds of roles.

**The findings pose questions around what factors influence women's choices and opportunities around contracted hours, contract type and school type and phase.**

Further analysis and research are recommended to explore these aspects and leadership opportunities available through the lens of gender to make further recommendations on advancing leadership diversity.

#### Ethnicity and business leadership

- Most respondents identified as white (96%), with just 1% Mixed/multiple, 1% Asian/Asian British, 1% Black/African/Caribbean/Black British, and 1% 'other ethnic group' (another 1% declined to answer) (Figure 3.2).
- Ethnicity statistics from 2011 show 86% of the population of England and Wales identify as White (Office for National Statistics, 2019).
- 14% of the working-age population identifies with a Black or Minority Ethnic (BME) background (Crown, 2017).
- Ethnic diversity is therefore lower than average across the sample, with multiple school settings presenting as having the least ethnic diversity across the sample.
- There was also a lack of line-management responsibility evident in any category other than 'White'. Ethnicity did appear to be a slight influence on strategic participation and to those holding an MBA/master's business-related qualification (100% identified as 'White').

#### Implications and recommendations for diversity

Various studies argue that gender and racial diversity in leadership are significant contributors to business success (McKinsey & Co, 2013) (McKinsey & Co, 2015) (Grant Thornton, 2017) (Crown, 2017).

Gendered differences in perceptions of, and subsequent responses to, risk and uncertainty and therefore the impact on decision-making have been suggested, plus there are positive correlations between organisational performance and gender balance in decision-making, particularly in terms of financial growth.

**This suggests the sector should remain aware of and champion diversity across leadership teams, not only in relation to ethnicity and gender but also in relation to diversity of perspectives, knowledge and skills base, and perception.**

#### Aspects that could be particularly helpful to schools include:

- Raising awareness of gender diversity throughout organisations, not just at senior team level, but also at governing body and trustee level;
- Encouraging diverse models of leadership, mentoring and role modelling;
- Reviewing recruitment and development; creating cultures of calculated risk and encouraging collaborative risk management processes.

## 4.2 Motivation to move into the sector and in-sector mobility

- Motivation to enter the profession was predominantly for either career development, better working hours or a desire to work in education, though to a lesser degree than the first two factors (Figure 3.8).
- Those aged 55–64 were more likely to be seeking better working hours than other age groups.
- Career development motivation spread evenly across respondents from most age groups).
- Female respondents were also more likely to be motivated by better working hours or career development, with male respondents more likely to select career development, doing something for the greater good or due to redundancy.
- Those SBPs who are 'second career' professionals (e.g. 55% of those aged 35–44 years) report a range of professional origins, mostly from non-school administration, banking/finance, private sector management or local government, with a similar trend for those aged 45–54 years and 55–64 years.
- The data also presents an encouraging pipeline, with 24% of respondents having moved into the profession in the last 7 years and with 27% of respondents aged 55+ within ten years of state retirement age, the new influx could alleviate the impact of this.
- The data also suggested career 'inertia' from longer-serving respondents than those who had been in the sector for a short period (e.g. 4–7 years).
- There was evidence of more career mobility for respondents in MAT structures/schools than single-school settings (Figures 3.12–13), and for those with higher-level qualifications (Figure 3.17).
- Over half of school business managers and senior generalists (individual school) had been in role for over 13 years, with 53% of school business managers having never changed roles and 38% having never moved schools.
- The analysis further highlighted that 57% of those not attending any SLT or strategic meetings were most likely to have been in the sector for 13+ years (with 24% with 13–20 years' service and 33% with 21+ years). The trend for the age of many of these respondents was 55+ years.
- Those in LA maintained schools were less likely to have changed roles or moved schools than those respondents from MAT teams or schools (Figures 3.12–13).
- There could be a link between career mobility and professional development via role changes and school movement and professional development when qualification levels are analysed.
- Most respondents joining the sector for career development had moved roles/schools twice or more (Figure 3.14).
- Similar proportions of respondents who had moved into the sector for career development were not engaged in coaching or mentoring activities.

## Implications and recommendations

Generally, the influx of new respondents over the last 7 years when compared to those due to reach state retirement age in the next decade suggests a potentially healthy pipeline, provided this trend continues. It is also encouraging to see many respondents interested in joining the sector for career development and due to a desire to work in education.

Furthermore, there appears to be an indication of increased career mobility for newer entrants, many of whom could be classed as 'second career' entrants, with increased likelihood of career development through role/school movement and professional development.

The analysis suggests that collaborative structures are influencing this mobility due to more diverse career pathways, along with higher qualification levels. This is despite the strong portion of senior generalists in MAT structures when compared with specialists in the same settings, with the data highlighting that the generalist role still has a strong presence in this sample.

It is recommended to continue to encourage a wide range of new entrants to the sector to continue to contribute a diverse base of knowledge and experience, as well as continuing to encourage longer-serving SBPs interested in career and professional development to continue to enhance their knowledge base, level of qualifications and career mobility in light of increasingly diverse structures and knowledge requirements.

### 4.3 Contracts, workload and pay

- There was a trend of full-time (35+ hours per week (hours per week)) contracts (Figure 3.26), with over half of respondents working 52-week contracts (Figure 3.25).
- Almost all respondents reported working over their hours, and the average salary level is lower than the UK national average (Figure 3.27).
- In relation to working hours, there was a clear pattern of respondents working over their contracted hours, with many working 40+ hours per week (Figures 3.27–28).
- Other trends of note included higher actual working hours for those with fuller strategic participation, higher salary levels and higher perceived value of the SBP role.
- Female respondents were more likely to work term time only than male respondents, and there is a trend of higher participation and earnings amongst male respondents.
- Respondents were likely to work over their hours regardless of the gender, pay and participation, but full-year contracts were more likely held by male respondents.
- Working hours may not necessarily be a barrier to career progression for female respondents, but contract type could have an influence.
- There was a denser spread of respondents earning between £20k and £40k.
- Those identifying as school business managers and senior generalists (individual schools) were more likely to earn between £20k and £30k despite working 35+ hours per week, with over half on full-year contracts (Figures 3.32–33).
- This suggests that the role of SBM could potentially be a lower- to averagely remunerated position based on the ONS (2019) national salary data (£585 per week / £30,420 approx. per annum).

### Implications and recommendations

The high working hours for the sample has implications in relation to workload as it illuminates the trend to work above and beyond contracts posing questions about sustainability, wellbeing and work–life balance and could influence the gender differences highlighted in theme 1 (diversity). This is also important to note in relation to those who came into the sector for better working hours (25%) as highlighted in ‘Sector Mobility’, raising questions as to whether this could influence the retention and career pathway of such individuals.

Workload is an important issue to address across the education sector. This is highlighted by the UK Government introducing in 2018 a (recently updated) workload reduction kit to guide schools on how to manage workload (DfE, 2019). It is important to further explore and illuminate high workload and champion a sustainable school business workload at local level, especially as the research focus has predominantly been on teacher and head teacher workload (DfE, 2019).

Furthermore, as the findings suggest a lower-than-average salary as compared to national averages, with the nuance of a gender pay gap and links to contract type, this also further highlights the importance of diversity in business leadership in education and the need to explore potential barriers to professionals who identify with different backgrounds, such as gender, and their attraction into the profession.

It is also important to ask questions about the nature of the different contract types for SBPs and explore their impact on workload, retention, career progression and the future pipeline, especially as working hours appear to suggest an attraction of talent into the workforce in this sample, yet evidence of working beyond contracted hours.

### 4.4 Qualifications, CPD engagement and role

- There was a range of CPD engagement and qualification levels (Figure 3.35–36).
- There were indications of a lack of higher-level qualifications.
- There was some influence of qualifications on strategic participation and the amount of CPD engagement taken in different settings.
- The data is encouraging in terms of percentage of respondents who hold a qualification, with most respondents holding a level 4 qualification, with level 6 following and level 2/3. However, there is a significant drop in level 5 and at level 7.
- Most respondents had taken time for CPD (Figure 3.37).
- Almost half of the respondents took 1–3 days with far fewer taking less than a day or none.
- Those in executive roles were more likely than other groups to take 4–5 days compared with those in school business manager roles or other roles.
- Executive senior generalists in multi-school settings had taken the most CPD (6–10 days).
- Most respondents were aware of ISBL and the Professional Standards (Figures 3.20–21), with most respondents in academy settings and special schools aware, with a dip in maintained-school respondents.
- When exploring qualifications and strategic participation, qualification levels did not have much influence on the level of attendance and participation across most settings except for a slight influence for those in a MAT central team.

- There was evidence that those with level L5–L7 qualifications working 35+ hours per week are more likely to attend all strategic meetings in their setting and also feel their role is perceived as ‘essential’ by the SLT than other groups of respondents.
- There is evidence suggesting that higher qualification levels when mixed with working hours could influence full participation.
- Respondents working in non-maintained schools indicated they are more likely to participate in all strategic meetings (67% non-maintained as opposed to 41% maintained) (Figure 3.40).
- There is a link between qualification levels and career mobility within the section, as highlighted earlier in ‘sector mobility’, which suggests that higher-level qualifications could influence career progression, particularly in collaborative multi-school structures (e.g. MATs).
- The influence of qualification level on strategic participation suggested differences between male and female respondents, with male respondents appearing slightly more likely to have higher-level qualifications than female respondents.

### Implications and recommendations

The density of qualifications at level 4, alongside the very limited number of qualifications at level 5, the declining number of level 6 (as compared to level 4) and limited number of level 7 qualifications, raises questions in relation to the knowledge base and potential knowledge gaps.

**It is in everyone’s interest to ensure that we have an appropriately qualified SBP professional community to support the wider school workforce in ensuring our school system is managed properly from an organisational, financial and resourcing perspective.**

### 4.5 Strategic participation

- The data suggests an encouraging level of strategic participation across the sample but highlights some room for improvement and nuanced influences on levels of participation.
- Most respondents participate in all senior strategic meetings in their setting, and a further sizeable proportion indicated participating occasionally when deemed relevant (29%) (Figure 3.39). However, this poses the questions – ‘deemed relevant by whom?’ and ‘what meeting content is deemed relevant to participate in?’
- A further 10% are not participating at all and 6% only participating in relevant meetings.
- There was a possible relationship between the increased SLT value of SBP roles and respondents’ strategic participation.
- Those who indicated their role is perceived as ‘essential’ indicated their participation at all meetings (67%), whereas those not attending any meetings was indicated by 5% of those also selecting ‘essential’ (Figure 3.42). This could be interpreted as the more valued the role by SLT, the increase in participation at strategic meetings.
- Furthermore, school phase also appeared to have some influence, with those in secondary and further education phases more likely to participate in all or some strategic meetings than those in primary or early years settings.
- Regarding role focus, the analysis suggests executives (both senior generalist and specialists) in multiple schools are the most likely to participate in all strategic meetings in their settings.
- Assistant generalist roles had the least participation in individual schools, but this increased slightly for those in multiple schools.
- Turning to senior generalists in individual schools, 58% indicated participating in all strategic meetings, with 26% occasionally invited when deemed necessary. When the data was analysed at the intersection of participation and job title, executive-level respondents were more likely to report fuller participation than those titled School Business Manager or those with ‘other’ role titles.
- A gender tension also emerged (as discussed in 1. Diversity section) in that male responses suggested higher levels of participation in strategic meetings (70%) compared to female respondents (52%), despite the female-to-male dominance in the sample.
- Analysis of school type suggests a higher level of attendance to and participation within SLT meetings amongst respondents working in academies (SAT/MATs) and special schools than their counterparts within maintained school settings (Figure 3.40).
- The perception of the role within the school also appeared to influence the level of respondent interaction with senior staff members and governors within their schools and settings, with increased value and interaction appearing to increase the likelihood of fuller participation in strategic meetings.

### Implications and recommendations

Overall, it was encouraging to see some strong rates of strategic participation across the sample, with those attending SLT and all strategic meetings a positive change across the board in the last decade. It is also very positive to see how many respondents felt ‘essential’ or ‘valuable’ to their SLT, which again underlines the growth of the profession. However, that said, in relation to the data on individual schools and senior generalists, inclusion at the SLT/highest level could be further improved, as it raises questions around strategic input on decision-making on matters of school business, finance, HR, procurement, and support services in individual schools when a business professional – an expert in these aspects – is not included. Therefore, as the subsection on diversity also underpinned, and the data highlights in regard to the value of the role by senior leaders and level of interaction with governing bodies, it is advisable that SLT groups and governors consider the diversity of knowledge and skills base from different perspectives to ensure they are well represented in all school matters, including business leadership.

## 4.6 Coaching and mentoring

The data suggests that 60% of all respondents report having no involvement in coaching and mentoring activity. This is a significant proportion of the SBL workforce and may well be indicative of the inertia amongst this community that has been reported elsewhere (Armstrong, 2016). A fast-paced and turbulent educational policy environment coupled with over a decade of structural reform has fundamentally changed the ways in which schools need to be organisationally and financially managed and led. The school business leadership function sits at the forefront of such change and is therefore increasingly requiring of a professional, dynamic and motivated workforce who are willing and eager to prioritise their own professional development. The fact that half of our respondents are not engaged in coaching and mentoring activity is a cause for concern in this respect. The reasons for these figures are unclear, although it is likely the closure of the National College, for so long a source of subsidised professional development opportunities for the school business leadership community, has been a factor.

## 4.7 Conclusions and next steps

This study shows that whilst the School Business Leadership profession and its significance to our education system has advanced considerably over the last decade there are still areas where we can continue to improve.

In a sector-led, self-improving system, both collaboration and engagement are key. We are stronger as a professional community when we work together; learning from each other, supporting each other and acting as trailblazers for those coming through behind us. In an evolving system, where change remains the only constant, practitioners will best service their schools if they remain current by being abreast of developments in; government policy, legislation, technology and innovation. The education sector needs to create the space and professional capacity to allow this to happen.

As a result of this research, ISBL will commit to the following:

- Work with key stakeholders to ensure adequate time and space is provided to School Business Professionals to undertake ongoing CPD.
- Work with the Department for Education and other key stakeholders including head teacher and governance associations to ensure the professional experience, talent and qualifications of SBPs is better understood with the aim of achieving greater leadership parity.
- Work with SBPs, the Department for Education and other key stakeholders including headteacher and governance associations to develop clear career pathways that respond to the needs of our evolving system.
- Work with communities, including regional groups and Local Authorities, to help the SBP profession better reflect the ethnic diversity of the children and families they serve.
- Work closely with training providers and the Department for Education to develop new tailored and more accessible professional development programmes that directly meet the needs of practitioners, their professional aspirations and the immediate needs of their current school context.
- Encourage and facilitate more thought leadership amongst the SBP community by convening round table discussions (which include head teacher and governance colleagues), establishing focus groups, supporting participation in policy consultations and commissioning practitioners-led research.

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# Appendices

## Appendix 1: Survey items (telephone survey items that were identical to the online survey)

Good morning ... my name is AgentName. I am calling on behalf of the Institute of School Business Leadership (ISBL). ISBL has commissioned us at Qa Research to contact school business professionals to book an appointment to carry out a short telephone interview. May I speak to [named contact/role]?

ISBL is committed to continuous improvement within the school business professional community. There have been significant changes in the education sector in the 10 years since the National College commissioned a detailed study of the SBP workforce. This survey is designed to help ISBL to gain a better understanding of the current workforce profile of school business practitioners in all school types and phases.

By agreeing to participate in this survey, you will help improve the knowledge base of your own profession and ensure professional development initiatives are focused and targeted to improve SBP practice across the education system.

This survey should take no more than 10 minutes to complete. Would you be willing to help ISBL by answering the survey, and would now be a good time to go ahead?

If 'Yes', continue. If 'No', either make an appointment to call back or thank and close.

Thank you. Before we begin, may I assure you that all your answers will be treated as confidential, as required by the Market Research Society's Code of Conduct. If you wish to learn how your personal data and responses will be handled, we can provide you with a link to [Qa's/ISBL's] GDPR privacy policy.

Initial survey findings will be presented by the ISBL Chief Executive, Stephen Morales, on the opening day of ISBL's National Conference in November. ISBL then aims to publish a full report during Spring 2020.

This call will be recorded, but for our internal quality procedures only. Is this all OK?

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**Q1.** What is your school URN (or school you are based within)? This will be used only for elimination purposes from the online version of this survey. This is not being used to identify individual responders.



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**Q2.** How do you identify your gender?

- 1 Male
- 2 Female
- 3 Other

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**Q3.** What is your age group?

- 1 24 or under
- 2 25–34
- 3 35–44
- 4 45–54
- 5 55–64
- 6 65+

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**Q4.** How would you describe your ethnic background?

- 1 White
- 2 Mixed/multiple ethnic groups
- 3 Asian/Asian British
- 4 Black/African/Caribbean/Black British
- 5 Other ethnic group
- 6 Prefer not to say

If = 5, Only ask 'Q4\_Other'

Other

**Q5.** Which was the most important factor when you first considered a school business career? (READ OUT)

- 1 I was looking for more favourable working hours
- 2 I wanted to do something for the greater good
- 3 I wanted to work in education
- 4 I faced redundancy in my previous role and wanted to move sector
- 5 Career development opportunity within/from outside of education

**Q6.** Prior to becoming a school business professional, in which sector(s) were you employed? Select all that apply (READ OUT)

(20 maximum responses)

- 1 Administration (not in a school)
- 2 ICT (not in a school)
- 3 Banking or finance (not in a school)
- 4 Marketing (not in a school)
- 5 Management (private sector)
- 6 Management (public sector)
- 7 Facilities management (not in a school)
- 8 HR/personnel (not in a school)
- 9 Local government/authority
- 10 School administration
- 11 School finance
- 12 School facilities management
- 13 Teaching and learning
- 14 School marketing
- 15 School ICT
- 16 School HR/personnel
- 17 Training
- 18 At university/school
- 19 Not applicable
- 20 Other (please specify)

If = 20, Only ask 'Q6\_Other'

Other

**Q7.** How long have you worked in a school/education setting in total?

(INTERVIEWER: include all years worked in the sector; not just at current setting)

- 1 Less than one year
- 2 1–3 years
- 3 4–7 years
- 4 8–12 years
- 5 13–20 years
- 6 21+ years

**Q8.** Over this period, have you ever for a time moved out of working in this sector? If so, how often?

- 1 Never
- 2 Once
- 3 Twice
- 4 3+ times

**Q9.** Throughout your career, how many school business roles have you so far worked in? (Include promotions within a MAT structure, or if you hold a split role and this is as the result of a promotion/additional post, please count this twice.)

- 1 This is my first
- 2 2–3
- 3 4–5
- 4 More than 5



**Q10.** How many times have you moved roles in the last 10 years within the education sector? (Include promotions within a MAT structure, or if you hold a split role and this is as the result of a promotion/additional post, please count this twice.)

	Not moved	Once	Twice	More than twice
Within school/trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To a new school/trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q11.** How long have you been in your current role?

- 1 0–5 years
- 2 6–10 years
- 3 11–15 years
- 4 16–20 years
- 5 More than 20 years

**Q12.** What is your current contract?

- 1 Employed by one school
- 2 Self-employed providing SBM services in one school
- 3 Employed by an SBM services provider
- 4 Employed by one school but supporting other schools too
- 5 Self-employed providing SBM services in more than one school
- 6 Not currently employed in a school
- 7 Employed by the trust (SAT or MAT)

**Q13.** What are your contracted hours of employment and how many hours do you actually work?

	Up to 20hrs	20–24.9hrs	25–29.9hrs	30–34.9hrs	35–39.9hrs	40–44.9hrs	45hrs or over
Contracted hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hours actually worked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q14.** Please indicate your contract period:

- 1 Term-time only contract
- 2 52-week contract
- 3 Other (please specify)

If = 3, Only ask 'Q14\_Other'

Other

**Q15.** Within which of the following salary bands does your current salary sit (actual gross salary)?

- 1 £1–15,000
- 2 £15,001–20,000
- 3 £20,001–30,000
- 4 £30,001–40,000
- 5 £40,001–50,000
- 6 £50,001–60,000
- 7 More than £60,000

**Q16.** Please select the closest match to the title of your current role

- 1 School Business Manager
- 2 School Business Director
- 3 School Business Leader
- 4 Business Development Manager
- 5 Bursar
- 6 Finance Manager/Director
- 7 Vice-Principal/Executive Director
- 8 Head Teacher
- 9 PA to Head Teacher/Principal
- 10 School Administrator/Admin Officer

**Q16.** Please select the closest match to the title of your current role (cont'd)

- 1 CFO
- 2 COO
- 3 Accountant
- 4 HR Director
- 5 Facilities Manager
- 6 Marketing Manager/Director
- 7 Other (please specify)

If = 17, Only ask 'Q16\_Other'

Other

**Q17.** What percentage of the overall tasks associated with the school business role do you personally perform within your school/trust, e.g. at least 50%?

(must be inferior to 100)

**Q18.** How would you describe your current role focus? (Select ALL that apply) READ OUT

(8 maximum responses)

- 1 Individual school – senior generalist (e.g. SBM)
- 2 Individual school – assistant generalist (e.g. Assist. SBM)
- 3 Individual school – specialist/discipline-based (e.g. finance, HR)
- 4 Multiple schools – executive team member – senior generalist (e.g. COO/VP)
- 5 Multiple schools – executive team member – assistant generalist
- 6 Multiple schools – executive team member – senior specialist/discipline- based (e.g. CFO/HR Director)
- 7 Multiple schools – specialist/discipline-based (e.g. within finance, procurement, HR)
- 8 I have a different focus (please specify)

If = 8, Only ask 'Q18\_Other'

Other

**Q19.** Do you currently line-manage other school business staff and, if so, how many?

- 1 Yes, 1–2
- 2 Yes, 3–5
- 3 Yes, 6–10
- 4 Yes, more than 10
- 5 No

**Q20.** Who line-manages you?

- 1 Head Teacher
- 2 Deputy/ Assistant Head Teacher
- 3 Chief Operations Officer
- 4 Chief Financial Officer
- 5 CEO
- 6 Chair
- 7 Other (please specify)

If = 7, Only ask 'Q20\_Other'

Other

**Q21.** Do you regularly participate in strategic meetings with the most senior staff in your setting?

- 1 No, and I don't attend SLT meetings
- 2 No, but I attend SLT and/or relevant subcommittee meetings to contribute to discussions
- 3 Yes, and I attend all meetings
- 4 I am occasionally invited to specific meetings when it is deemed relevant

**Q22.** Which regular interactions do you have with your school's governing body? (Select ALL that apply)

(6 maximum responses)

- 1 Governance meetings
- 2 Regular face-to-face
- 3 Keeping-in-touch calls
- 4 Emails
- 5 No interaction
- 6 Other e.g. Linked Governor (please specify)

If = 6, Only ask 'Q22\_Other'

Other

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**Q23.** How do you believe your role as a school business professional is perceived by the senior leadership team (SLT) in your setting?

- 1 Essential
- 2 Valuable
- 3 Average importance
- 4 Not valuable
- 5 Of little importance

**Q24.** Are you engaged in any mentoring or coaching activity? (Select ALL that apply)

I am currently...

	mentoring someone...	being mentored by someone...	coaching someone...	being coached by someone...	not undertaking coaching or mentoring activity...
...in my own school/trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...in another school/trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...not in a school/trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q25.** Were you aware of ISBL prior to this survey?

- 1 Yes
- 2 No

**Q26.** Were you aware of ISBL Professional Standards prior to this survey?

- 1 Yes
- 2 No

**Q27.** What qualifications do you hold? (Select ALL that apply)

(13 maximum responses)

- 1 Level 2 and 3 vocational qualification
- 2 CSBM/L4 Diploma in SBM
- 3 DSBM/L5 Diploma in SBM
- 4 ADSBM/L6 Diploma in SBM
- 5 Bachelor's Degree in business-related area
- 6 Bachelor's Degree in non-business area (please specify area in the space below)
- 7 MBA/Master's in business-related area
- 8 Master's degree in non-business area (please specify area in the space below)
- 9 Certified/Chartered Accountant (ACCA/CIMA/CIPFA)
- 10 Other finance/accountancy (e.g. AAT/Cert/Diploma)
- 11 CIPD/HR-related (e.g. L4–6 Cert/Diploma or other)
- 12 Postgraduate Certificate or Diploma (Level 7)
- 13 Other (please specify)

If = 13, Only ask 'Q27\_Other' If = 8, Only ask 'Q27\_Masters' If = 6, Only ask 'Q27\_Degree'

Degree

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Masters

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Other

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**Q28.** How much CPD have you undertaken this year?

- 1 1–3 days
- 2 4–5 days
- 3 6–10 days
- 4 More than 10 days
- 5 Other e.g. none, less than one day (please specify)

If = 5, Only ask 'Q28\_Other'

Other

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**Q29.** Which of the following professional organisations are you a member of apart from ISBL? (Select ALL that apply) READ OUT

(10 maximum responses)

- 1 ACCA
- 2 AAT
- 3 CIMA
- 4 CIPFA
- 5 CIPD
- 6 CMI
- 7 CIM
- 8 CIPS
- 9 ASCL
- 10 NAHT

**Q30.** Which school type are you currently working in?

- 1 Independent (primary)
- 2 Independent (secondary)
- 3 Maintained
- 4 Single-academy trust
- 5 Free school
- 6 Special school
- 7 Pupil referral unit
- 8 Studio school
- 9 UTC
- 10 Not applicable
- 11 School within a MAT
- 12 MAT central team
- 13 Other e.g. MAT teaching school (please specify)

If = 13, Only ask 'Q30\_Other'

Other

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**Q31.** Which school phase are you currently working in?

- 1 Early Years Education only (age 0–5)
- 2 Primary Education (KS1/2 e.g. from age 3/4+)
- 3 Primary Education (KS1/2 including full Early Years provision 0+)
- 4 Secondary Education (KS3/4)
- 5 Secondary Education (KS3/4 including 14–19 provision)
- 6 All phases including Early Years from age 0+
- 7 All phases from Foundation stage
- 8 Other (please specify)

If = Only ask 'Q31\_Other'

Other

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**Close**

Finally, have you been happy with the way this interview has been conducted?

- 1 Yes
- 2 No

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**Comments**

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**Thank and close**

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**Interviewer name**

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**RECORD THE FOLLOWING DETAILS:**

**Start time of interview**

**If True, set 'Now' to question 'FinishTime'**

**Interview finish time (time when you arrive at this screen)**

**Duration of interview (minutes)**

---

This is the end of the questionnaire.

If you need to, go back and make any changes now.

If you are happy with this survey and are ready to move on to the next survey, press the green forward arrow.

If you are due to go out on your break or finish your shift, tick the "pause" box and press the green forward arrow.

IF THIS WAS A COMPLETION, DO NOT USE THE RED X TO EXIT!!!

---

**Complete**

- 1 Complete
- 2 Test

If = 2, go to 'End' (and do not keep the questionnaire)

## Appendix 2: Sampling parameters calculated and provided by ISBL to Qa Research

### 2.1 Number of schools in the sector

There are, according to the DfE publication 'Schools, pupils and their characteristics: January 2019' (published on 27 June 2019), 21,261 state-funded schools in the school system.

According to this:

- 16,769 are state-funded primaries (32% of these are academies and free schools)
- 3,448 are state-funded secondaries (65% of these are academies and free schools)
- 1,044 are special schools

This means there are:

- 5,366 academy/free school primaries
- 2,586 academy/free school secondaries

Once these figures are taken away from those above, we have:

- 11,403 LA maintained primaries
- 862 LA maintained secondaries

This means, based on a total sample of 750, we would in theory require quotas as follows:

- 405 primary LA maintained respondents ( $11,403/21,261 = 54\%$  of whole school estate)
- 187 primary academy respondents ( $5,366/21,261 = 25\%$ )
- 120 secondary academy respondents ( $2,586/21,261 = 16\%$ )
- 30 secondary maintained respondents ( $862/21,261 = 4\%$ )
- 8 special school respondents ( $1044/21261 = \text{less than } 1\%$ )

### 2.2 The figures above are great, but who works in schools and who works in central teams?

As we have a current absence of recent SBP data, I am using a 2016 FOI to the DfE for the latest available breakdown of bursars and business managers to then overlay the figures above to get the proportions of SBPs working in schools and those in central teams (see Table 1 below).

**Table 1: SBP Bursar and Business Manager figures, FOI to DfE**

School type and phase	Number (sector proportion)	Total quota required	Qa call requirement
LA maintained nursery and primary schools	5,960 (51%)	383	215
Primary academies	1,800 (15%)	113	-
LA maintained secondary schools	1,070 (9%)	67	15
Secondary academies	1,910 (16%)	120	-
LA maintained special schools and alternative provision	660 (6%)	45	10
Special academies/alternative provision	180 (2%)	14	10
Centrally employed	40 (less than 1%)	8	-
Grand total	11,620	750	250

## Appendix 3: Full results

This results section is divided into two subsections, as follows:

3.1 Descriptive data (Demographics) about the respondents' background, role, base and other relevant factors.

3.2 Key findings from the analyses conducted on ISBL hypotheses or theories about what the data would show.

The hypotheses were set around the following five themes:

- Sector diversity
- Motivation for moving into the sector and in-sector mobility
- Contracts, workload and pay
- Qualifications, CPD engagement and role
- Strategic participation

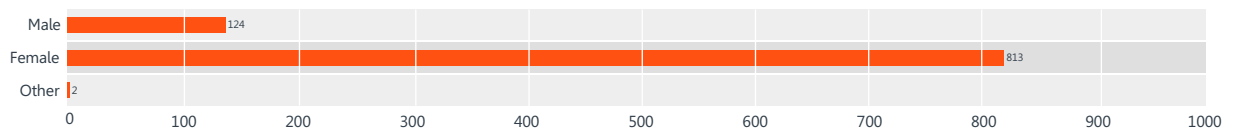
All figures reported have been subject to rounding at data analysis stage.

### Sample size

The total number of survey respondents is 939 (referred to as 'the sample'). This includes 689 who responded to the online survey and 250 who responded via phone call.

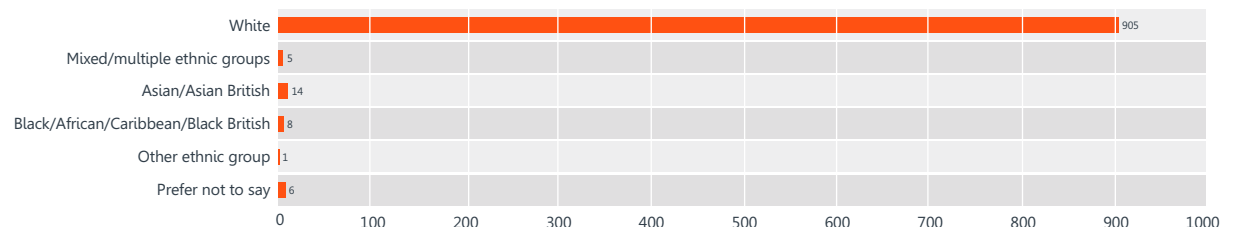
### 3.1 Demographics

#### Gender, ethnicity and age



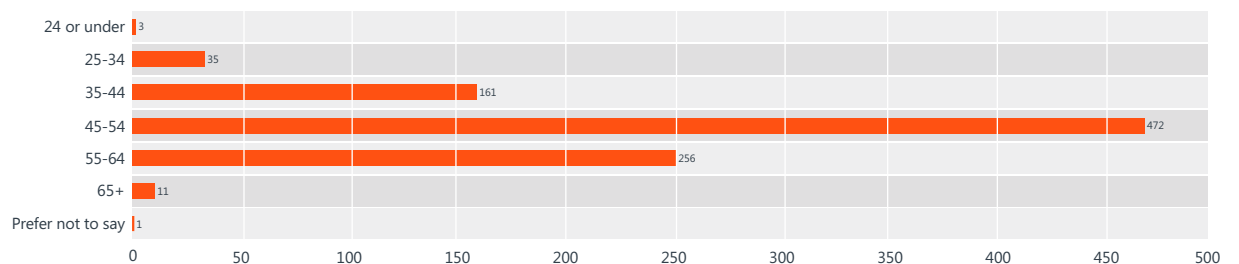
▲ Figure 3.1 Gender of respondents

86.6% of respondents identified as female and 13.2% of respondents identified as male, with 0.2% (n=1) identifying as 'other'.



▲ Figure 3.2 Ethnic background of respondents

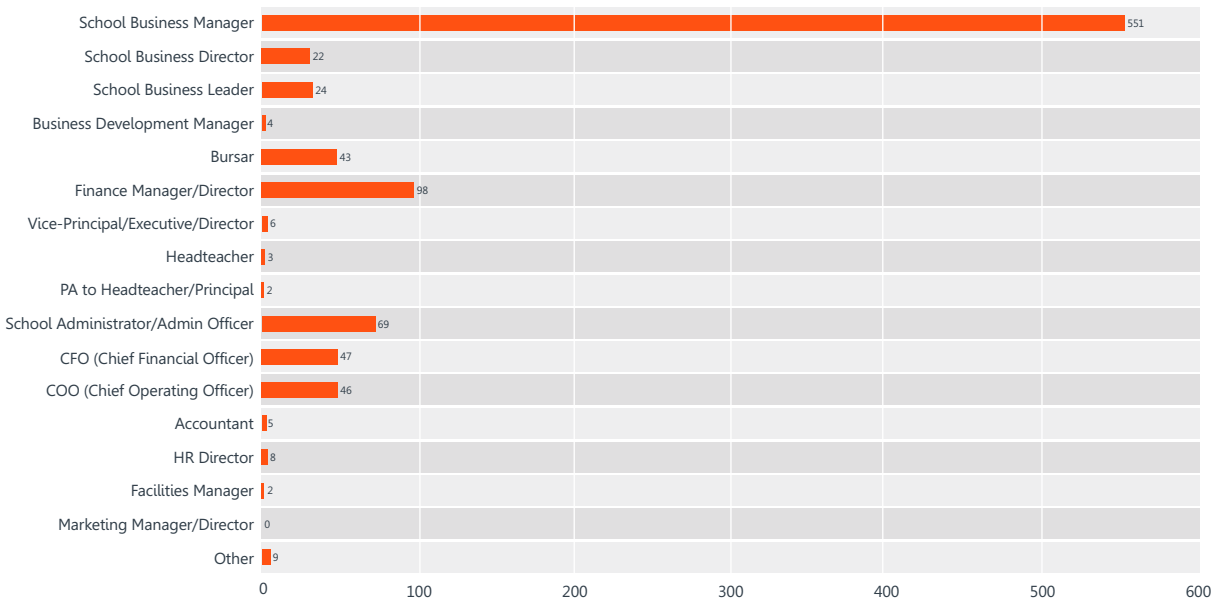
96% of respondents identified as 'White', 1% identified as 'Mixed/Multiple', 1% identified as 'Asian/Asian British' and 1% identified as 'Black/African/Caribbean/Black British' with 1% identifying as 'Other ethnic group'.



▲ Figure 3.3 Age of respondents

Most respondents identified as aged 45–54 (50%), compared to aged 55–64 (27%), which highlights over a quarter of the sample are nearing retirement. 17% identified as aged 35–44 category, with 4% identifying as aged 25–34 category and 1% aged 65+.

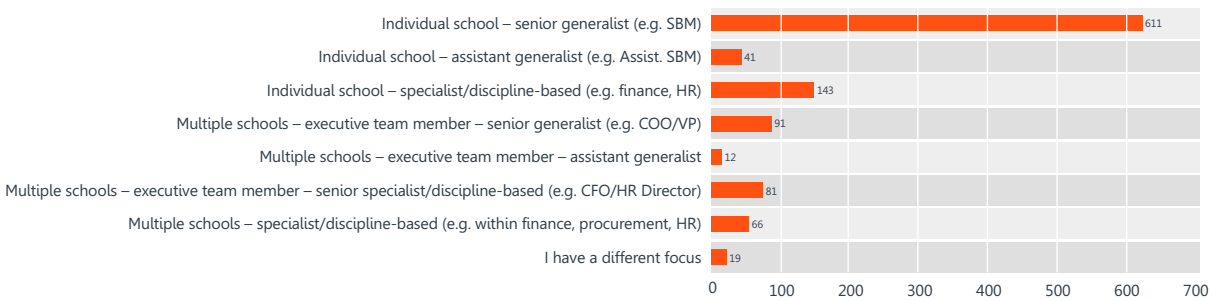
**Role type**



▲ Figure 3.4 Role title of respondents

A large proportion of the respondents (59%) selected 'School Business Manager' as their role title. 10% indicated an executive role (i.e. CFO, COO or Vice Principal) and a further 10% indicated 'finance manager/director'. 7% indicated 'school administrator', 5% indicated 'bursar', with the remaining 9% indicating a mix of 'school business director' (n=22), 'school business leaders' (n=24), 'accountant' (n=5) or 'HR director' (n=8).

**Role focus**



▲ Figure 3.5 Type of role

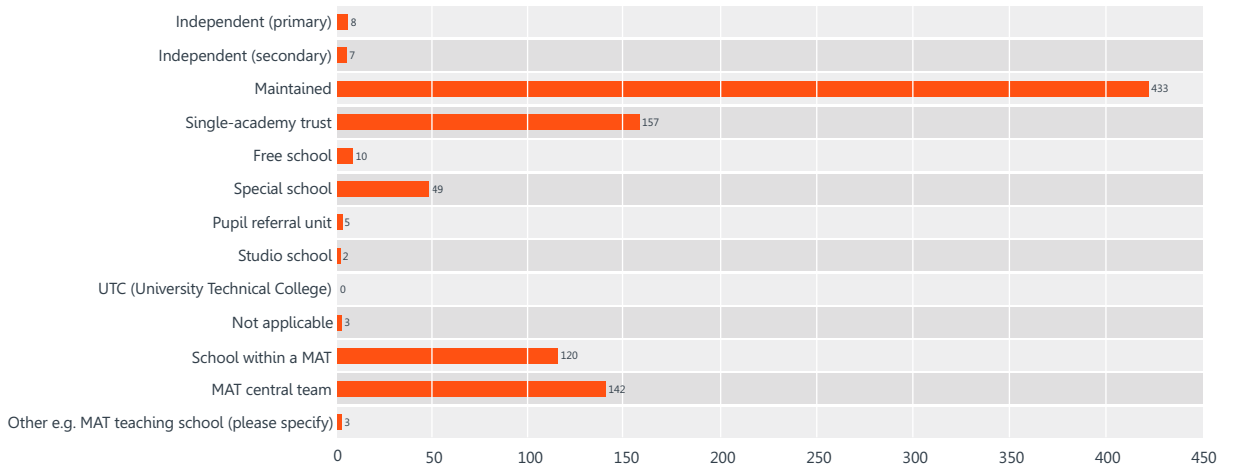
75% of respondents reported being a 'senior generalist' (65% based in an individual school, 10% in a multi-school setting). This contrasts with 31% of specialists (15% based in an individual school, 9% as senior specialists in a multi-school and 7% as a specialist in a multi-school setting).



**75%**  
of respondents reported  
being a 'senior generalist'



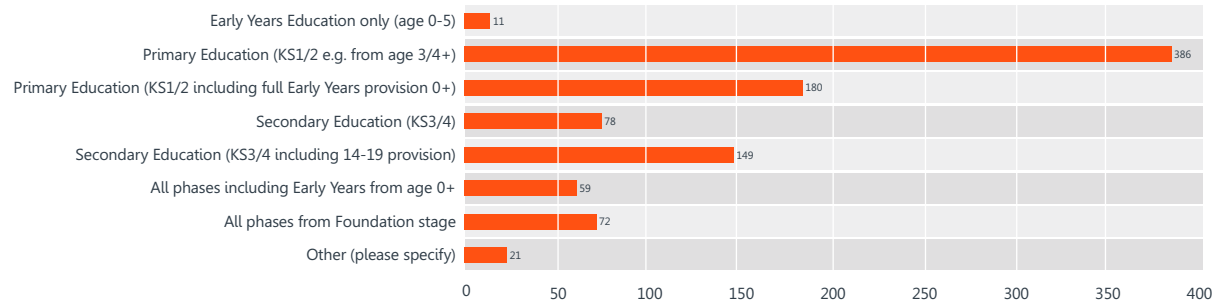
## School type



▲ Figure 3.6 School type

Most respondents (46%) indicated that they are based in LA schools, compared to 17% indicating their base in single-academy trusts (SATs) and 13% based in a single school in a multi-academy trust (MAT). 15% of respondents indicated their base in a MAT central team.

## School phase



▲ Figure 3.7 School phase

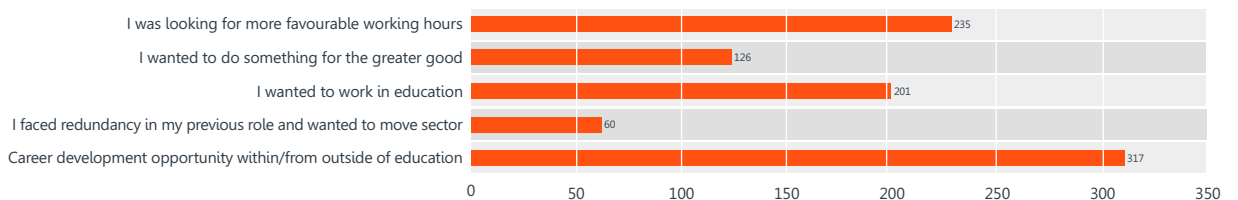
A large proportion of respondents (39%) indicated their base is in primary education, i.e. age 3–4 plus (without Early Years provision). Only 1% were based in Early Years (EY) where this is their organisation's only provision. Another 19% of respondents were based in primary education, which then includes an EY provision. 16% of respondents selected secondary education including 14–19 provision (with a further 8% selecting secondary education without 14–19 provision). 8% of respondents selected all-through from foundation stage with 6% in all phases including an EY provision.

## 3.2: Key findings

### Motivation for moving into the sector and in-sector mobility

The next data set shows motivation for moving into the sector and in-sector mobility (the level to which respondents have changed roles or changed school/setting). Three other factors have influenced this movement: school type; length of time in the sector; professional development, as well as the relationships between these factors.

### Motivation for moving into the SBP sector

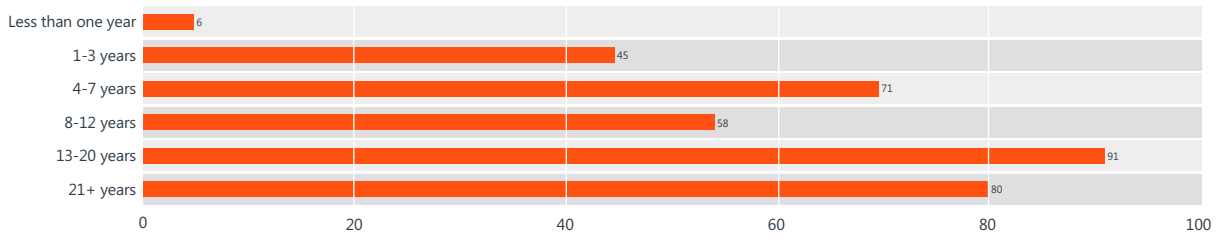


▲ Figure 3.8 Motivation for moving into the sector

Motivation to enter the profession was measured by asking for the most important (therefore single) factor from a short list. Most said it was predominantly for either career development (34%) or better working hours (25%).

Another fifth said it was due to a desire to work in education (21%). This suggests over a third of respondents are interested in career progression.

**Career mobility within the sector**



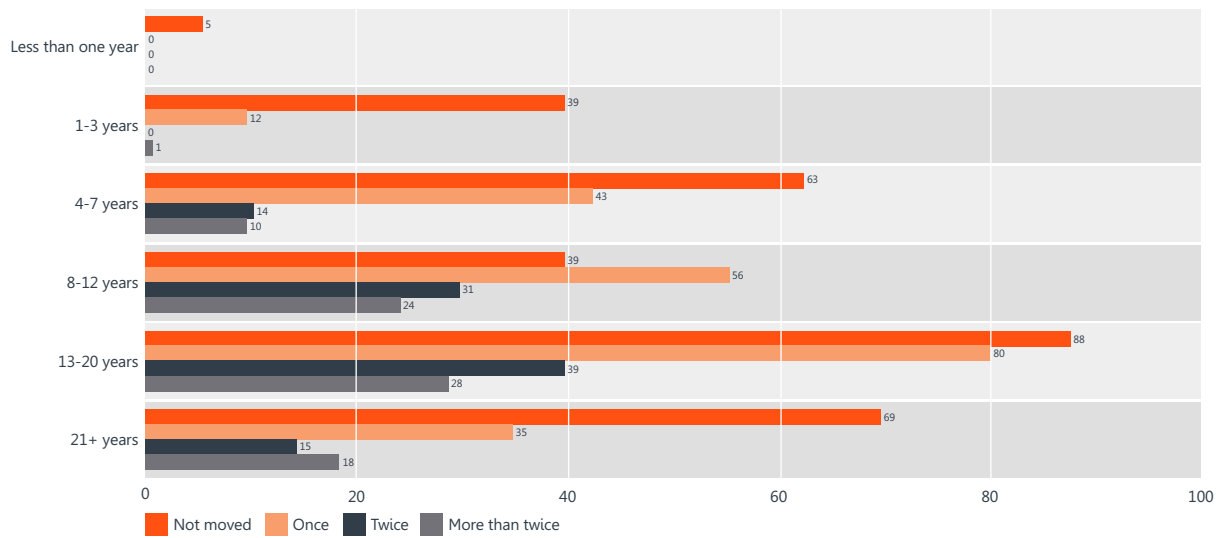
▲ Figure 3.9 Respondents who have never moved roles and their time in school (n=351)

Almost half of the respondents (49%) who said they hadn't changed roles in the last 10 years also said they had worked in the sector for 13–20 or 21+ years. This presents a sense of 'inertia' from a large proportion of long-service respondents.

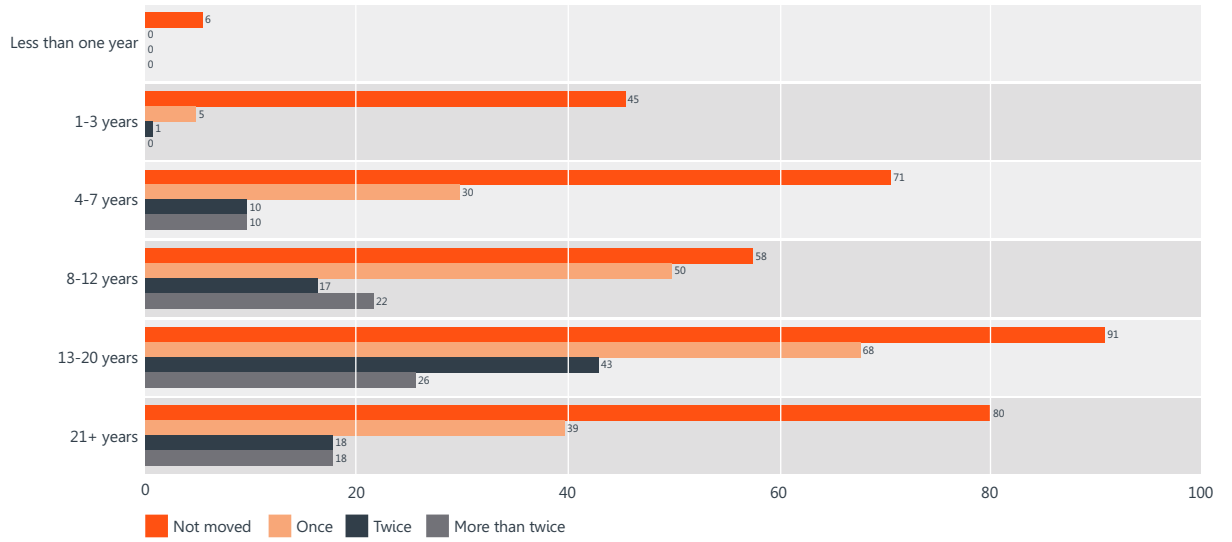


**49%**

Almost half of the respondents (49%) who said they hadn't changed roles in the last 10 years also said they had worked in the sector for 13–20 or 21+ years.



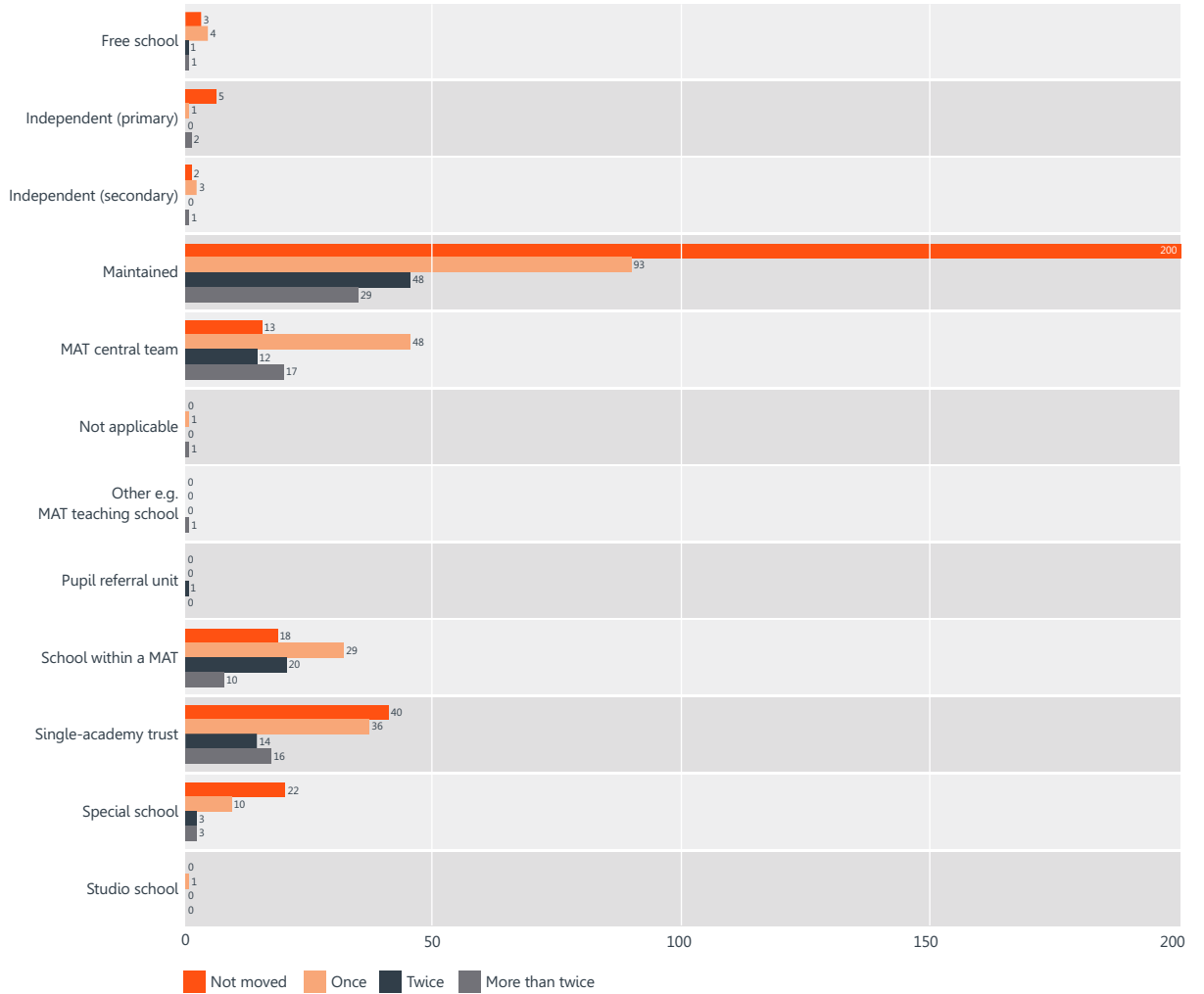
▲ Figure 3.10 Comparison of movement by age within the sector



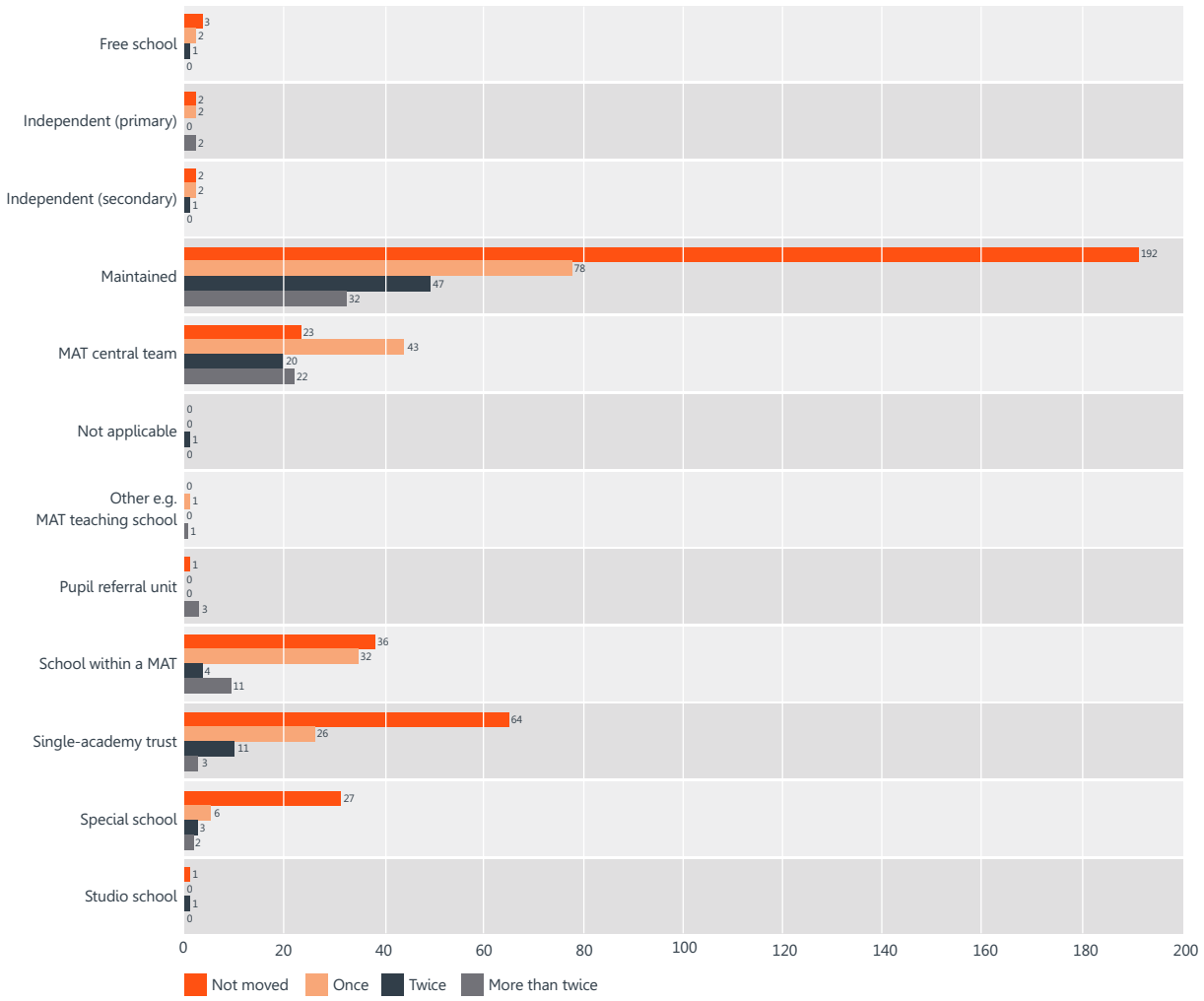
▲ Figure 3.11 Comparison of movement by age within the school/trust

The data also suggested that compared to those who have been in the sector for a shorter time, longer-service respondents have also changed role/setting less often. The two figures immediately above show the full data.

### School type, role and sector mobility



▲ Figure 3.12 Comparison of movement by school type within the sector



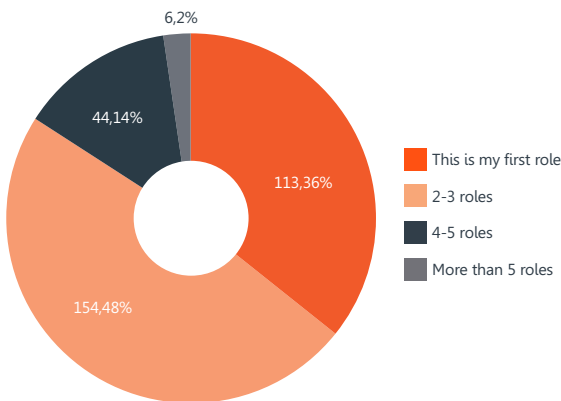
▲ Figure 3.13 Comparison of movement by school type within the school/trust

LA maintained schools had more respondents who have never moved role in the same school (55%) and never moved school setting either (66%). This contrasts with respondents in central MAT teams and schools within a MAT who have never moved role (17%) or to a new trust/school (10%).

Special schools also appear to have less role movement within the same school setting compared to single-academy trust schools.

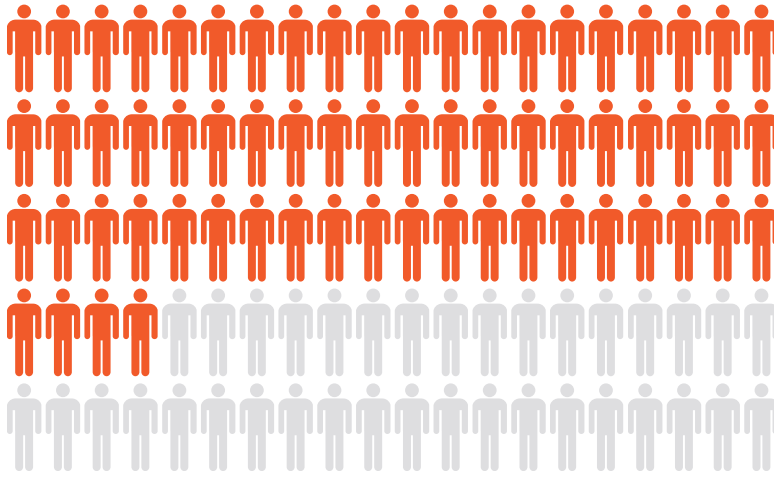
Hence, the data suggests there is a higher rate of role change in collaborative/MAT structures than maintained or single structures.

**Motivation for moving into the sector with total SBP career mobility**



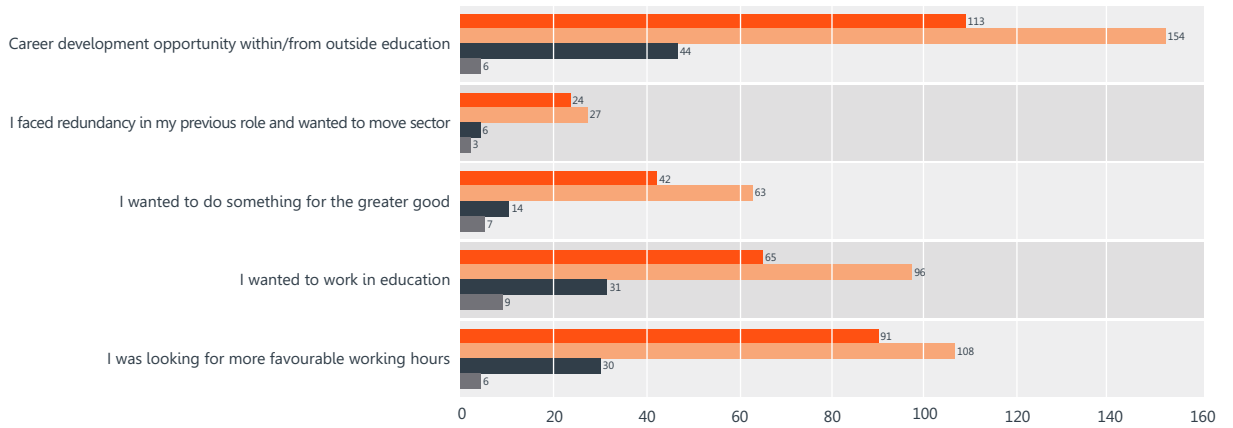
▲ Figure 3.14 Comparison of movement into the sector for career development and number of roles

Of those respondents who indicated that career development was the most important factor driving their choice for a career in the school business profession, 36% were in the same role, 48% have held 2–3 roles and 14% have held 4–5 roles over their career in total. Just 2% had held 5+ roles. This means two thirds (64%) had moved setting/school twice or more.



64%

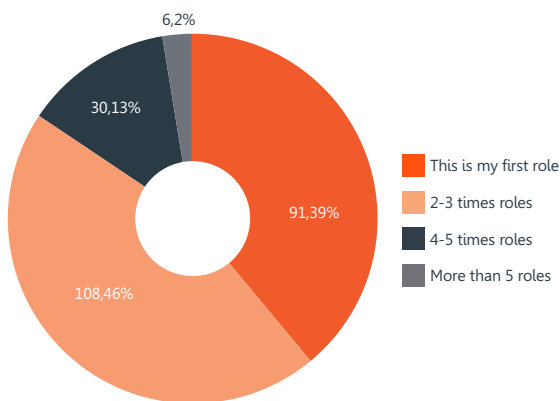
This means two thirds (64%) had moved setting/school twice or more.



▲ Figure 3.15 Comparison of movement into the sector by motivation and number of roles

Only 3% (n=31) of respondents across the entire sample indicated holding more than 5 roles during their time in the sector, which presents this as a least-likely scenario, as the majority indication across the sample was having held 2–3 roles (n=448/47%).

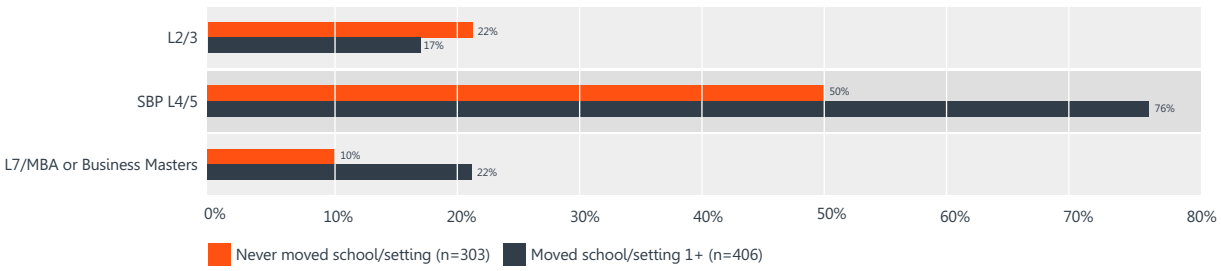
**Motivation for moving into the sector and mobility in the last ten years**



▲ Figure 3.16 Comparison of movement into the sector for more favourable working hours and number of roles

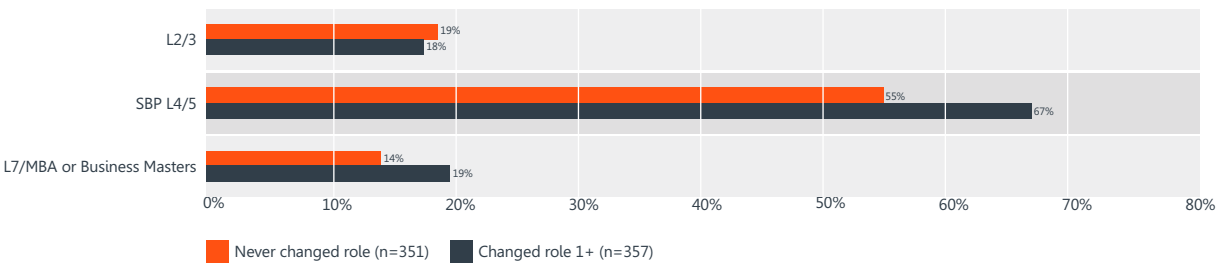
Close to two thirds (61%) of the respondents who said they had moved into the sector for more favourable working hours have moved since they came into the sector. 46% have moved 2–3 times. These figures are similar to those who came into the sector for career development (Figure 3.14).

**Professional development and sector mobility**



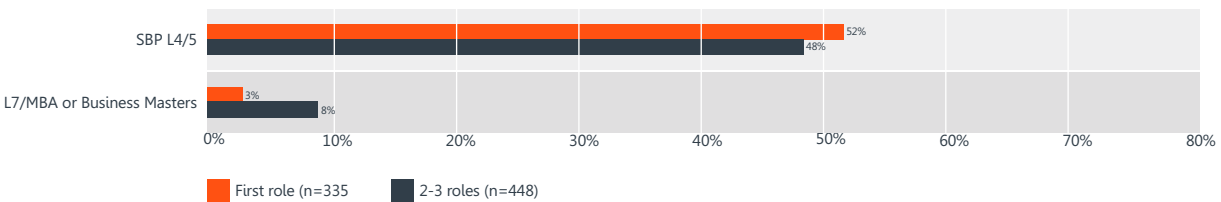
▲ Figure 3.17 Comparison of qualifications and movement of school/setting

43% (n=406) of respondents reported having moved school/setting once or more in the last ten years. Of these respondents, 17% (n=67) hold L2/3, 76% (n=308) hold a L4/L5 SBP qualification, 22% (n=88) hold either a L7 PG qualification or MBA/business-related master's. This is in comparison with 32% (n=303) of respondents reporting having never moved school/setting, of which 22% (n=67) hold L2/3 qualifications, 50% (n=151) hold L4/5 SBP qualifications, and 10% (n=33) hold L7 PG or MBA/business-related master's.



▲ Figure 3.18 Comparison of qualifications and movement within the school/setting

In relation to role movement within the same setting, there is also a slight link with qualification level (L4, L5 and MBA/business-related master's), but to a lesser extent than a change of school/setting.

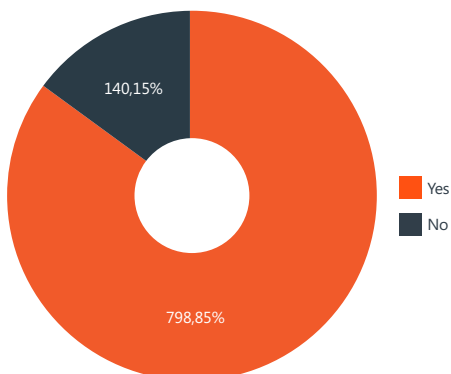


▲ Figure 3.19 Comparison of qualifications and number of roles

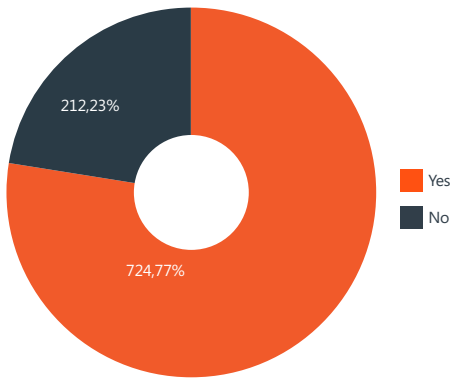
35% of respondents are in their first role (n=335). Of those, 52% (n=175) held a L4/L5 SBP qualification and 3% (n=9) hold an MBA/business-related master's. Of those reporting they are in their second or third role (48%, n=448), 67% (n=298) held a L4/L5 SBP qualification.

This suggests a link between role/setting movement and professional development when qualification levels are analysed.

**Awareness of ISBL, Professional Standards and sector mobility**

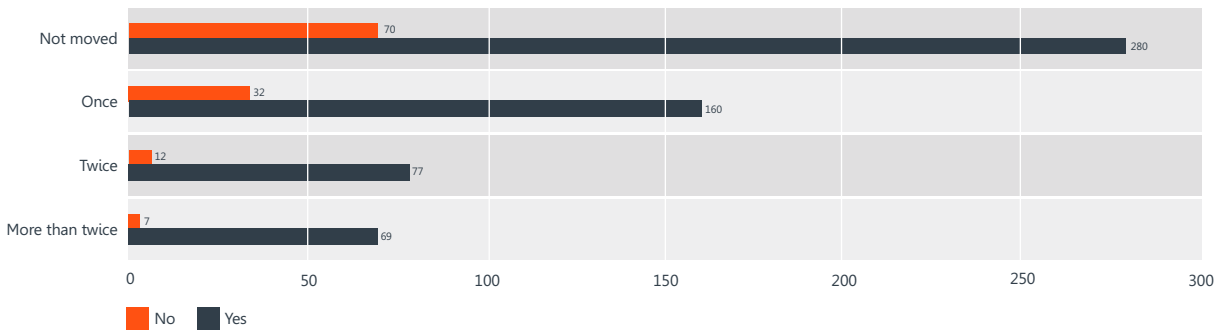


▲ Figure 3.20 Number of respondents aware of ISBL



▲ Figure 3.21 Number of respondents aware of ISBL Professional Standards

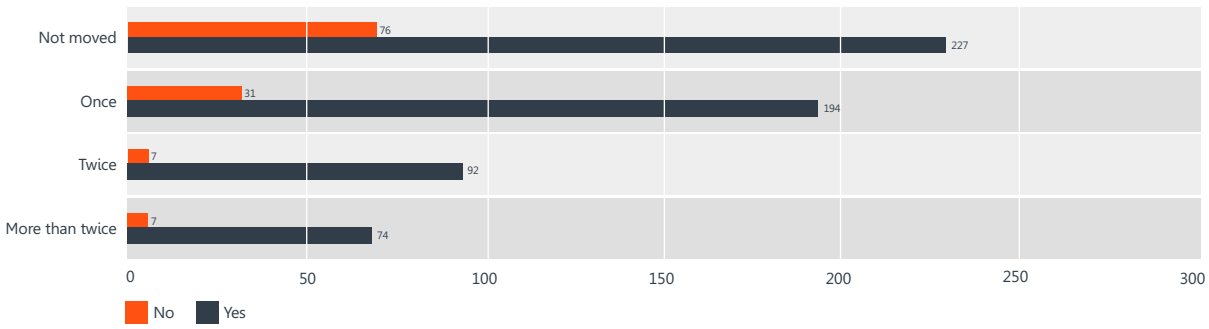
A total of 85% of respondents were aware of ISBL prior to the survey (n=798) and 77% aware of the Professional Standards (PS) (n=724) as shown in figure x.4.



▲ Figure 3.22 Comparison of respondent mobility in school with awareness of ISBL

20% of respondents who had never changed role indicated they were not aware of ISBL prior to the survey compared to 14% of those who had changed role; this indicated a slight increase in the likelihood of awareness for those who had moved.



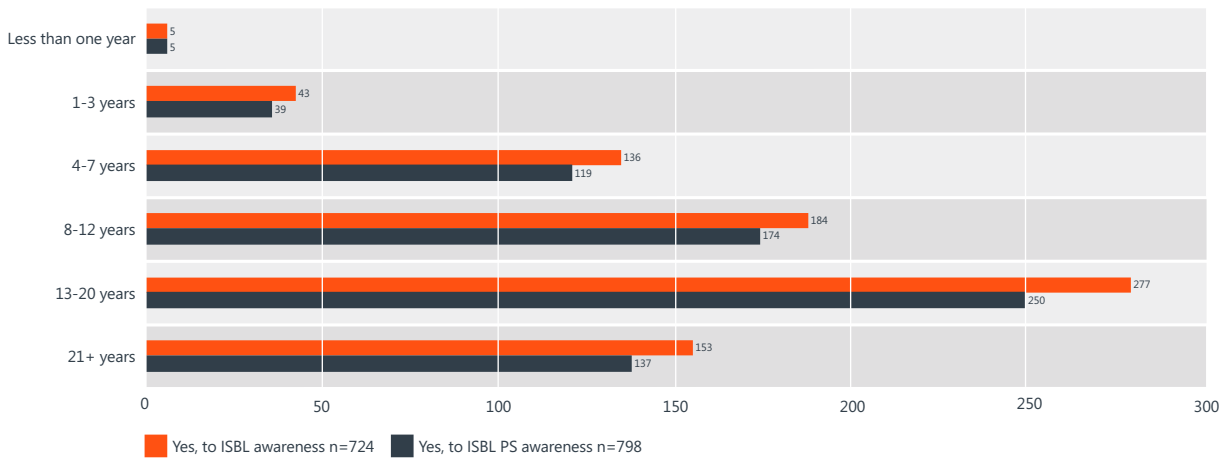


▲ Figure 3.23 Comparison of respondent mobility between schools with awareness of ISBL

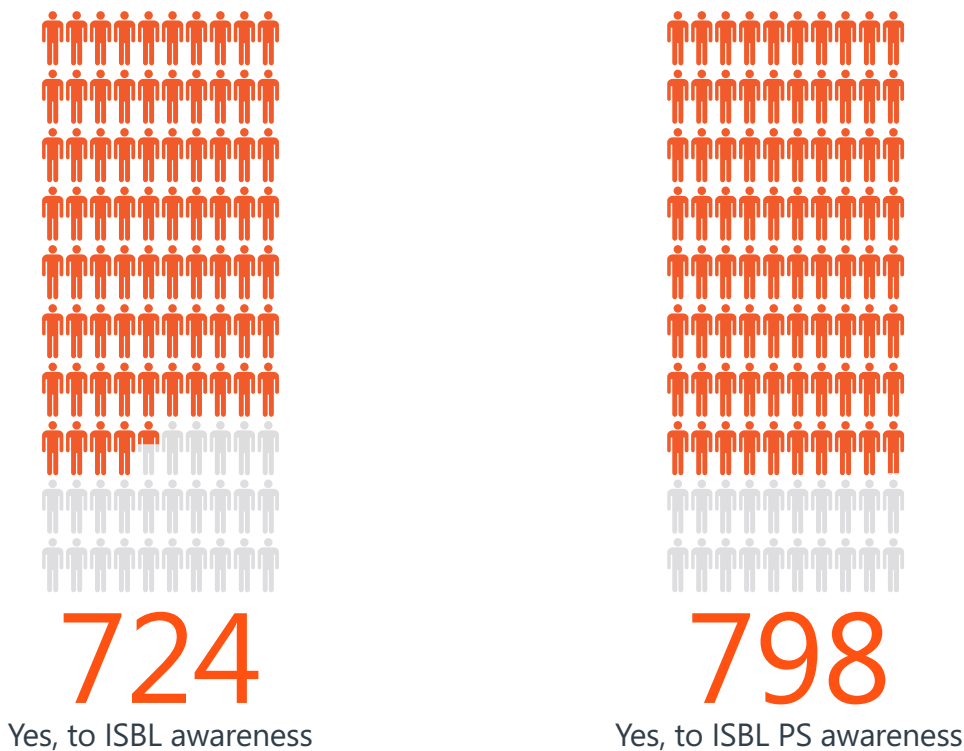
25% of respondents who had never moved setting/school indicated they were not aware of ISBL compared with 11% of respondents who had moved.

Therefore, in relation to role change and setting/school movement, those who had worked in fewer SBP roles were more likely not to be aware of ISBL than those who had held more than three SBP roles.

This pattern also presented in relation to awareness of the ISBL Professional Standards.



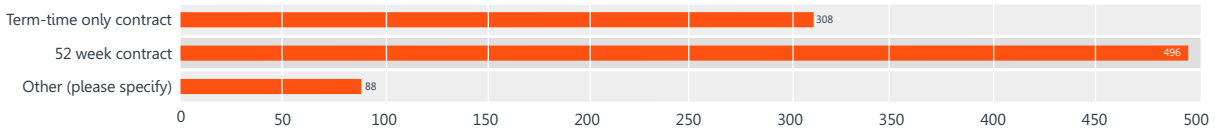
▲ Figure 3.24 Comparison of length of service with awareness of ISBL



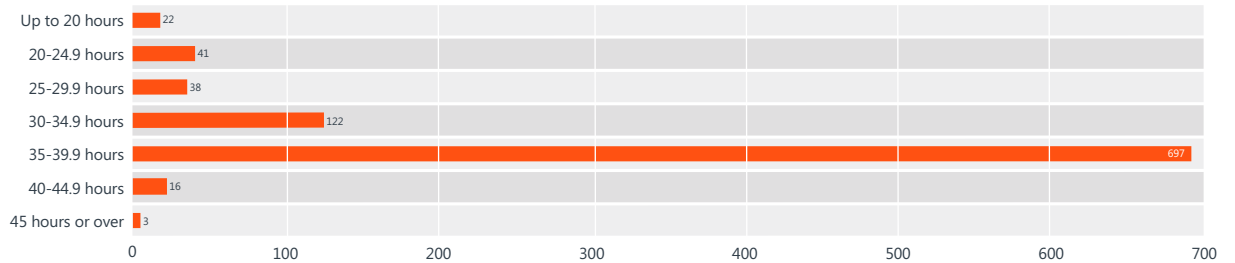


### Contracts, workload and pay

#### Working hours

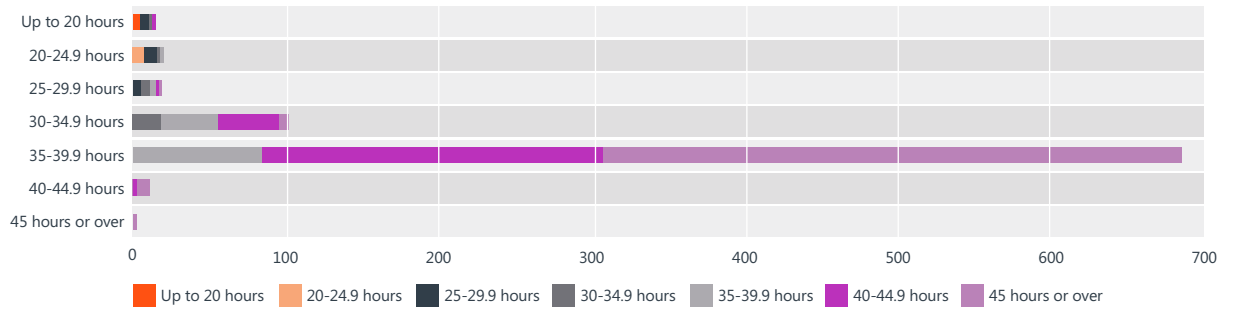


▲ Figure 3.25 contract type



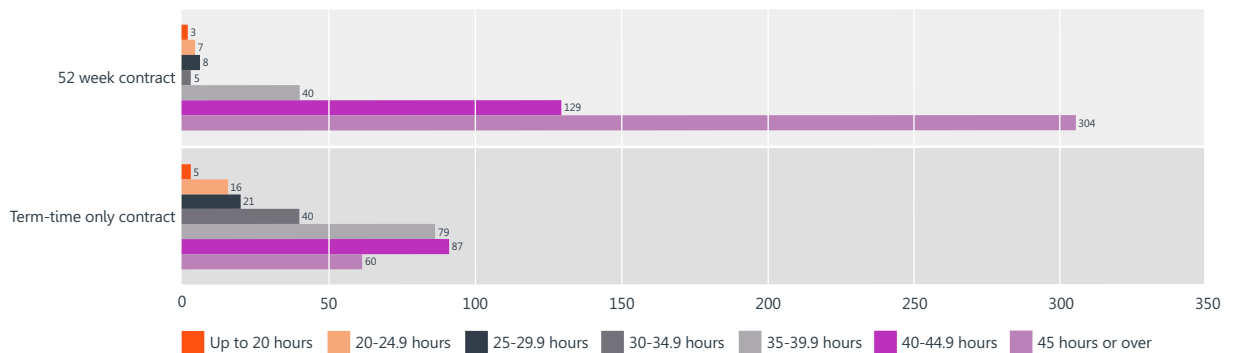
▲ Figure 3.26 contracted hours per week

Figures 3.25 and 3.26 present the spread of contract type and hours per week (hours per week), demonstrating that 56% of respondents work 52-week contracts and 74% work 35–39.9-hour weeks. 35% of respondents work term time only.



▲ Figure 3.27 Hours worked per week in comparison to contracted hours

When comparing contracted hours and actual hours worked, most of the respondents worked over their contracted hours of work regardless of their setting and contract type (Figure 3.27).



▲ Figure 3.28 Hours worked per week in comparison to annual contract

Figures 3.27 and 3.28 present the spread of contract type and hours per week (hours per week) across the sample. Of the sample, 76% are working more than 35 hours per week, and they are also more likely to have a 52-week contract (68% of 35 hours per week+ group).

There is a pattern across the sample of respondents being more likely to work over their contracted hours of work regardless of their setting and contract type.



76%

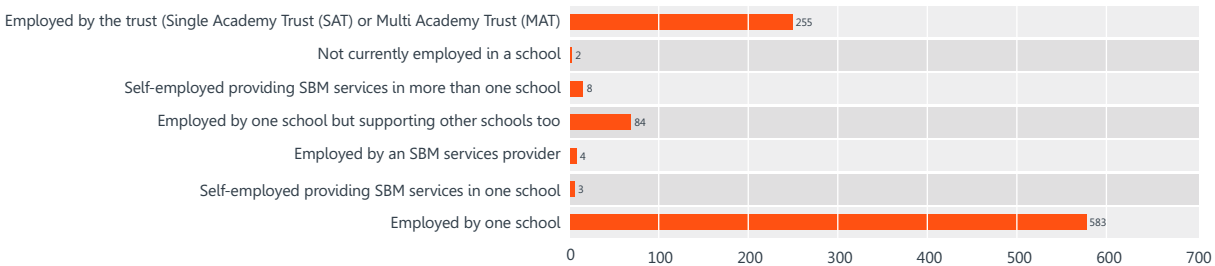
76% are working more than 35 hours per week, and they are also more likely to have a 52-week contract (68% of 35 hours per week+ group).

**Working hours and role type**

Most respondents selecting 'SBM' (77%) report being contracted for 35–39.9 hours per week (average full-time hours) with 54% of this group on a 52-week contract basis. 74% of respondents indicating they work in excess of 40 hours per week also indicated being a 'senior generalist' in an 'individual school'.

There is also a higher number of individuals working 40+ hours who are a 'senior executive' (as demonstrated through role title) and employed in 'multi-school' settings (68% of senior generalists, and 68% of senior specialists).

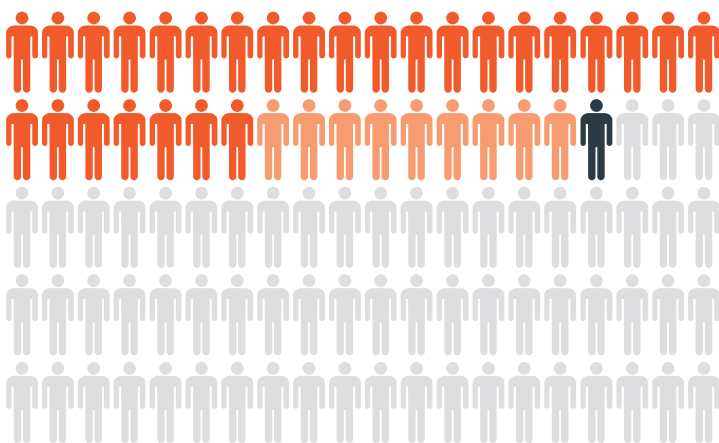
Therefore, actual working hours appear higher for respondents indicating they are senior generalists in individual schools than executive level roles in larger structures.



▲ Figure 3.29 Number of schools supported

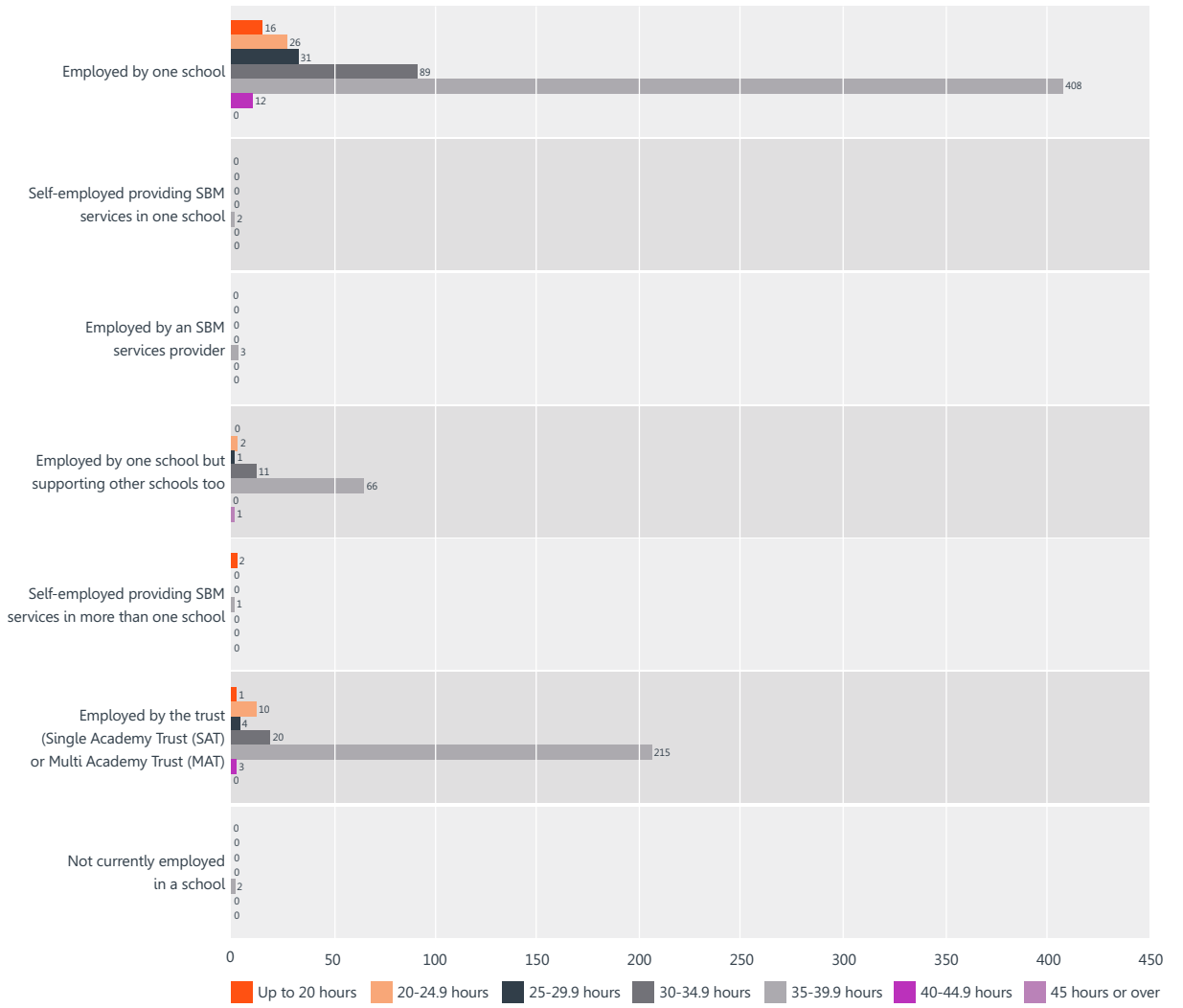
When exploring whether respondents supporting more than one school might have a higher workload than those who are working in a single school, SBM services provider, or not working in a school, 62% of respondents indicated being contracted by one school (Figure 3.29).

Around a quarter (27%) indicated being contracted by a trust (SAT or MAT), and another 9% indicated being employed by one school but supporting others. 1% selected self-employed providing SBM services.



27%

Around a quarter (27%) indicated being contracted by a trust (SAT or MAT), and another 9% indicated being employed by one school but supporting others. 1% selected self-employed providing SBM services.

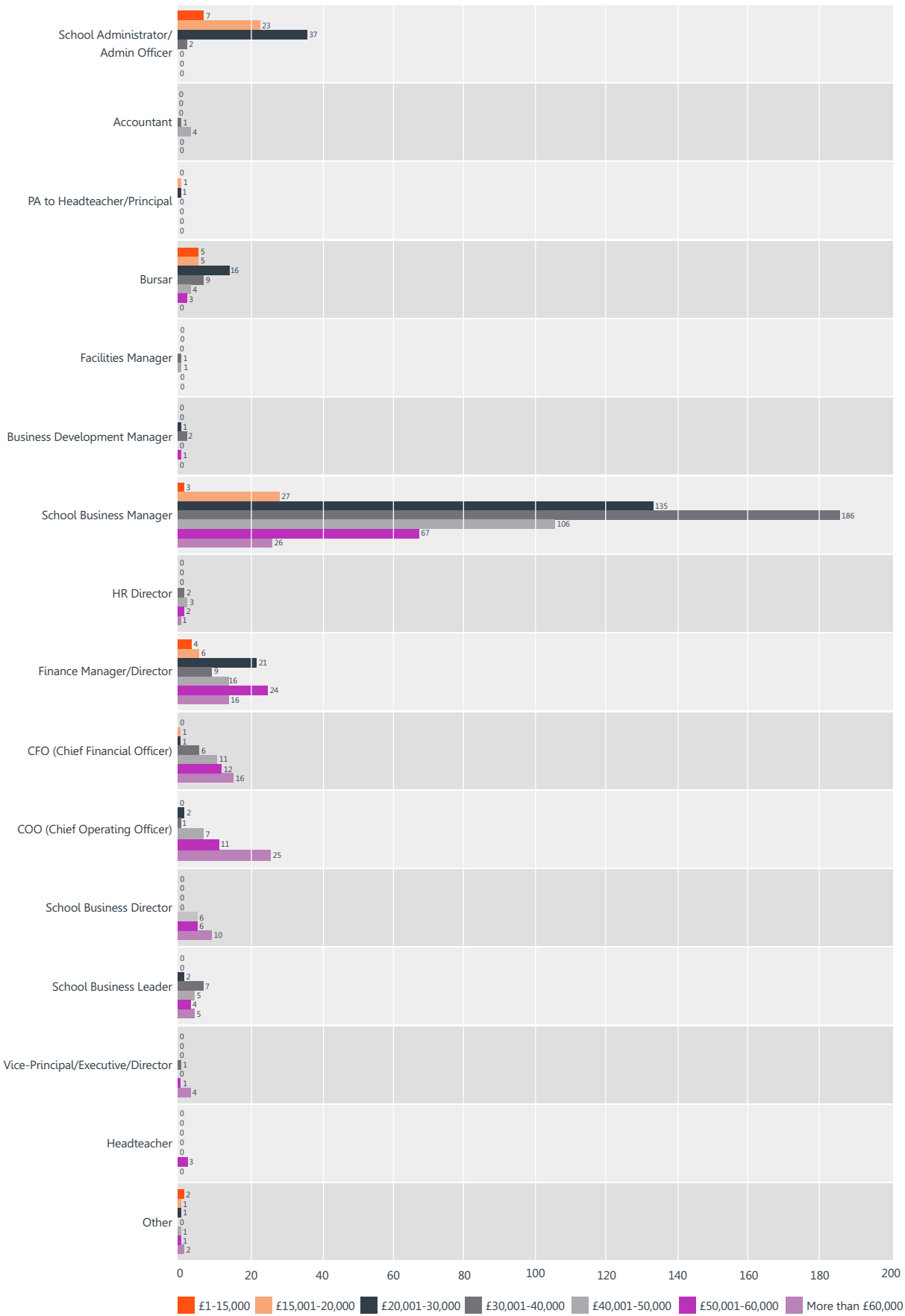


▲ Figure 3.30 Hours worked per week in comparison to number of schools supported

A breakdown of number of schools supported and hours contracted is shown in Figure 3.30. Being employed by one school was the most likely scenario, with the respondents working 35–39.9 hours per week as the most likely group.

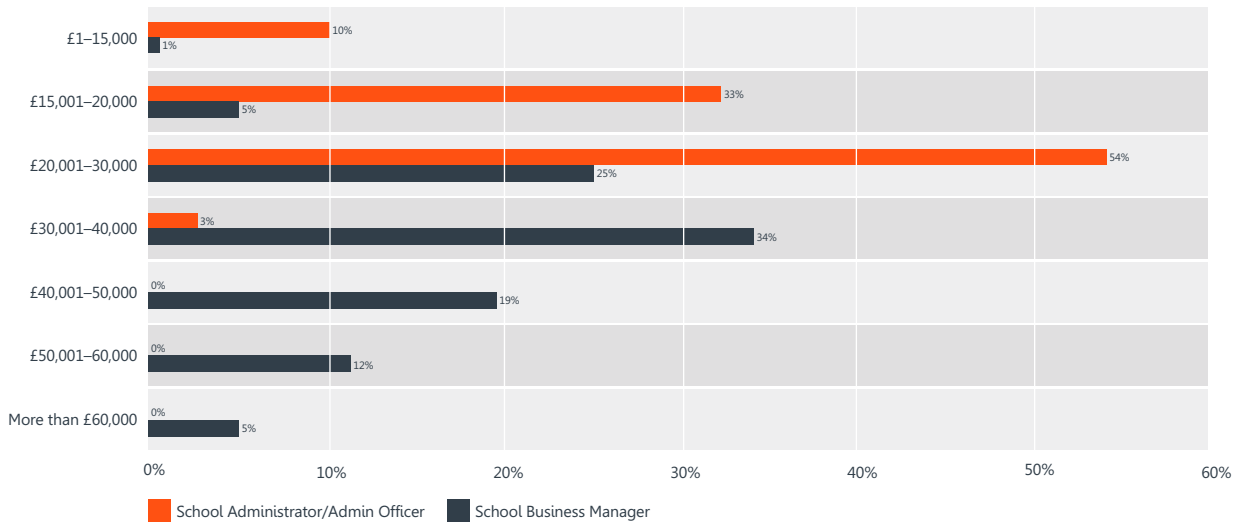
The data also indicates that those who are contracted for less than 35 hours per week are more likely to be employed by a single school than by a trust, which is influenced by the percentage of the sample indicating working in a maintained school setting.

Salary and role type



▲ Figure 3.31 Salary compared to role title

There is some evidence to suggest that salary levels follow the level and type of role, as higher levels of respondent seniority (according to role title) appear to attract higher salaries, as shown in Figure 3.31.

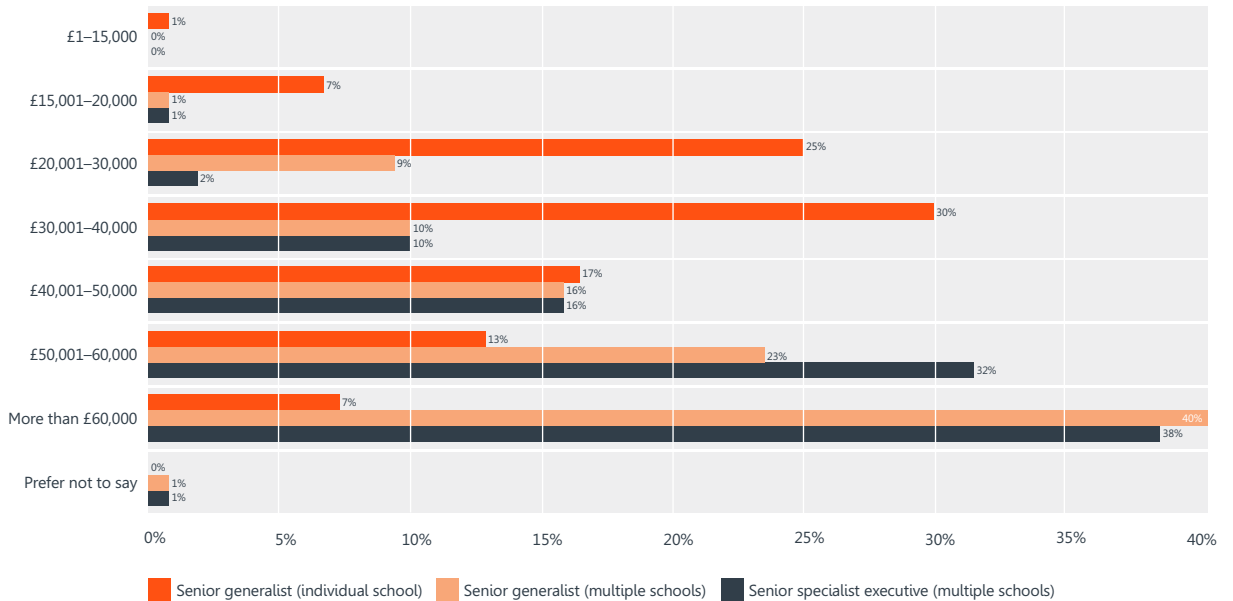


▲ Figure 3.32 Salary compared to two main role titles returned by respondents

54% of respondents selecting 'school administrator' as a job title reported earning £20–30k. 34% of those selecting 'SBM' indicated earning £30–40k, with 25% earning £20–30k.

### Salary, role type and hours

As highlighted earlier, given that the majority of SBM respondents (77%) are contracted 35–39.9 hours per week (average full-time hours) over 52 weeks (54%), this suggests the role is potentially a lower-to moderately remunerated position based on the ONS (2019) national salary data (£30k). However, executive level respondents are more likely to work 52 weeks (89%) than SBM respondents (54%), which is a potential influence on reported salary levels between the two groups.



▲ Figure 3.33 Salary compared to senior generalist and specialist roles in single and multiple schools

1. ONS (2019) Employee Earnings in the UK – ONS [online] [Accessed 26/11/19] Available at: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/bulletins/annualsurveyofhoursandearnings/2019>

The analysis also suggests those in executive level roles across multiple schools, whether generalist or specialist, have higher earnings than senior generalists in individual schools (all maintained settings) (See Figure 3.30).

There is a lower proportion of those identifying as 'senior generalists' employed in an 'individual school' who earn £40,000 or over (13%) compared to respondents working in the executive team across multiple schools (20%).

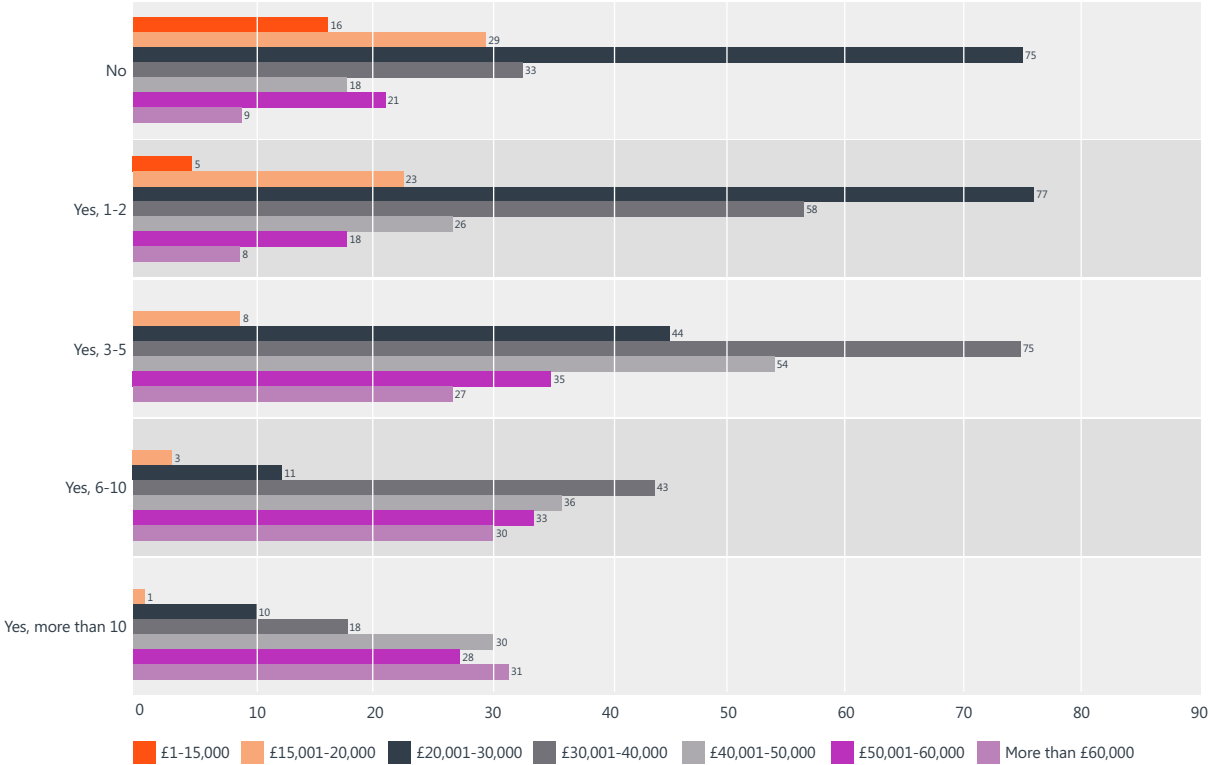
There was also a £30,000 earning ceiling for the 3% of respondents who identified as 'assistant generalist in an individual school' based in a maintained school setting (n=31).

However, as the data highlights, contract type is an influence to reported salary levels with more executive level respondents working 52-week contracts (89%) than school business manager respondents (54%).

As the data also highlights, there is a gap between the number of respondent CFOs (34%) and COOs (54%) who indicated earning over £60,000.

Therefore, the hypothesis appears to be supported in that the data presents that salary/earning levels appear influenced by role focus in relation to generalist, executive and specialist.

**Line-management and salary**



▲ Figure 3.34 Salary compared to number of staff line managed

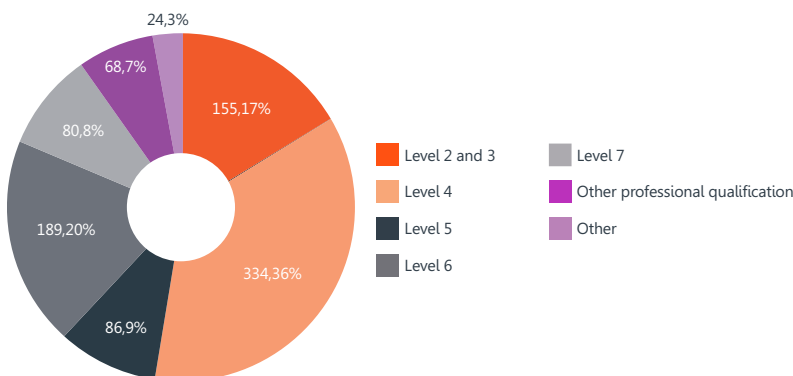
In relation to line-management and salary levels, 78.1% of respondents had line-management responsibilities, with the majority (48.8%) reporting between 1 and 5 direct reports.

There is significance in the data across the sample, that those who are line-managing more people are earning higher salaries compared to those who are not managing anyone (see Figure 3.34).

Taking those who have no line management responsibility, just over half (51%) earn between £15–30k, and over the data, this changes.

Of those who line-manage 1–2 people, 32% earn £15–30k, and correspondingly, 47% of those line managing 1–2 people earn between £30k and £50k compared to those earning the same with no line-management responsibility (25%). The pattern continues across the data for those line-managing 3–5 and 6–10 staff members.

**Qualifications, CPD engagement and role**

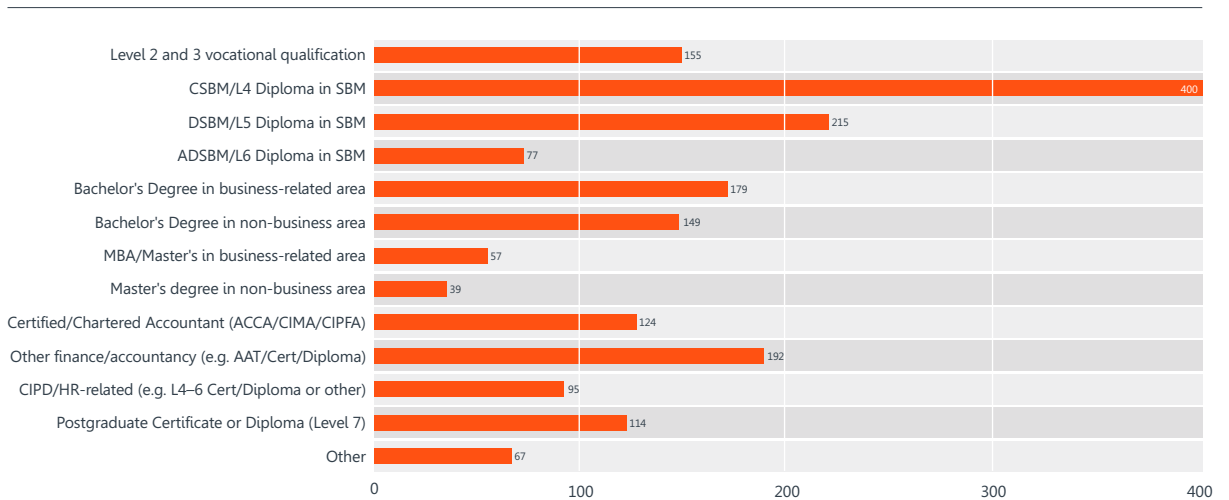


▲ Figure 3.35 Highest qualification

Level 4 was the highest qualification for over a third of the sample (36%), with level 6 following (20%) and level 2/3 (17%) (See Figure 3.35).

Level 6 included all bachelor's degrees and L6 SBM Diploma/ADSBM (20%). Level 7 was counted as all master's degrees, L7 postgraduate and certified/chartered accountancy of which a total of 9% of the sample indicated holding.

The 'other professional qualification' category includes CIPD/HR-related/other finance-related qualifications (7%).



▲ Figure 3.36 Qualifications held

Where respondents then made multiple indications, i.e. the respondents could list all of their qualifications, not just their highest level, the data presents a broad range of qualifications from level 2 to 7 (Figure 3.36: 936 respondents provided a total of 1857 responses).

Three quarters of respondents (74%, n=690) held a bespoke school business professional qualification, 43% L4/CSBM, 23% L5/DSBM, 8% L6/ADSBM. A third (35%) also held bachelor's degrees (19% in a business-related area).

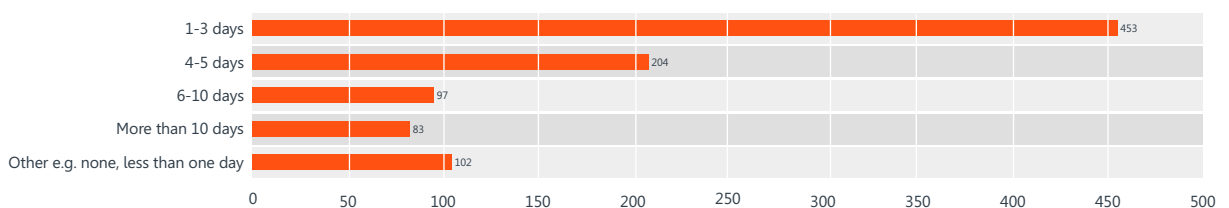
A further 10% indicated master's-level degrees (6% MBA/business-related area). 13% indicated holding certified or chartered accountant status, with 21% indicating other finance-related qualifications. 10% indicated CIPD/HR related qualifications, 12% postgraduate L7 and 17% level 2/3 qualifications.

### Qualifications and role type

Those holding MBA/business-related were more likely to be focused at executive level (16%) compared with those in school business manager roles (4%) or other (3%).

Those working in individual schools appeared to be more likely to hold Level 4 or under (64% of senior generalists), with specialists in those settings more likely to hold other finance-related qualifications. This was also reflected somewhat in multi-school settings, with a wider range of bachelor's- and master's-level qualifications.

### Continuing professional development (CPD) engagement



▲ Figure 3.37 CPD undertaken in 2019

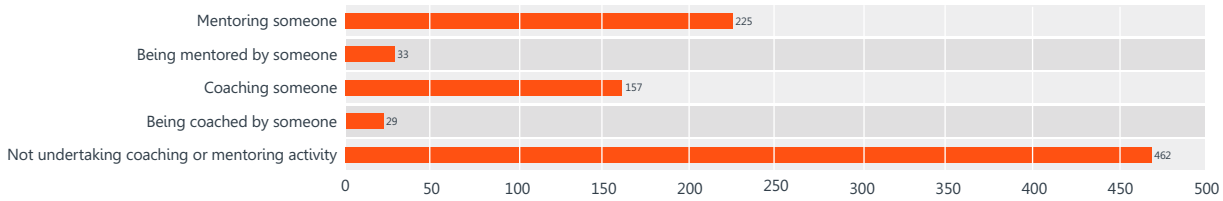
The majority of the sample indicated undertaking 1–3 days of CPD this year (48%, n=453), followed by 4–5 days (22%, n=204), 6–10 days (10%, n=97), more than 10 days (9%, n=83), with 11% (n=102) indicating none or less than one day.

### CPD engagement and role level

Those in executive roles (n=98) were more likely than other groups to take 4–5 days (32%) compared with 22% (n=120) of those in school business manager roles and 18% (n=53) of those in other roles.

Of the executive senior generalists in multi-school settings (n=91), 26% had taken 6–10 days of CPD. Of senior generalists in an individual school (n=611), 9% had taken 6–10 days of CPD. Senior specialists in multi-school settings were more likely to take 1–3 days.

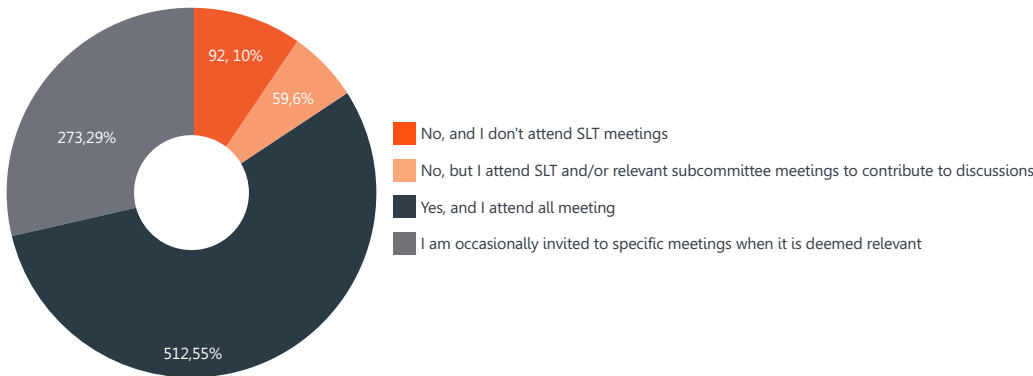
### Coaching and mentoring



▲ Figure 3.38 Coaching and mentoring

Out of a total of 873 responses, 60% told us they are not undertaking any coaching or mentoring activity, with just 4% being coached by someone and 4% being mentored by someone. A further 20% told us they were coaching someone, whilst 29% told us they were mentoring someone. Whilst a high proportion are coaching and mentoring someone, a much smaller proportion are being coached or mentored themselves.

### Strategic participation



▲ Figure 3.39 Attendance of SLT meetings

Just over half (55%) said they attended all SLT meetings, and 29% said they were occasionally invited to specific meetings to contribute. Another 10% (of n=936 responses) said they did not regularly attend strategic meetings with senior staff or indeed attend any SLT meetings at all. A further 6% said they did attend SLT and/or subcommittee meetings to contribute.

The data also indicated a relationship between the type of school setting, perceptions of the SBP role based on levels interaction with senior staff and with the school's governing body. This is explored below.

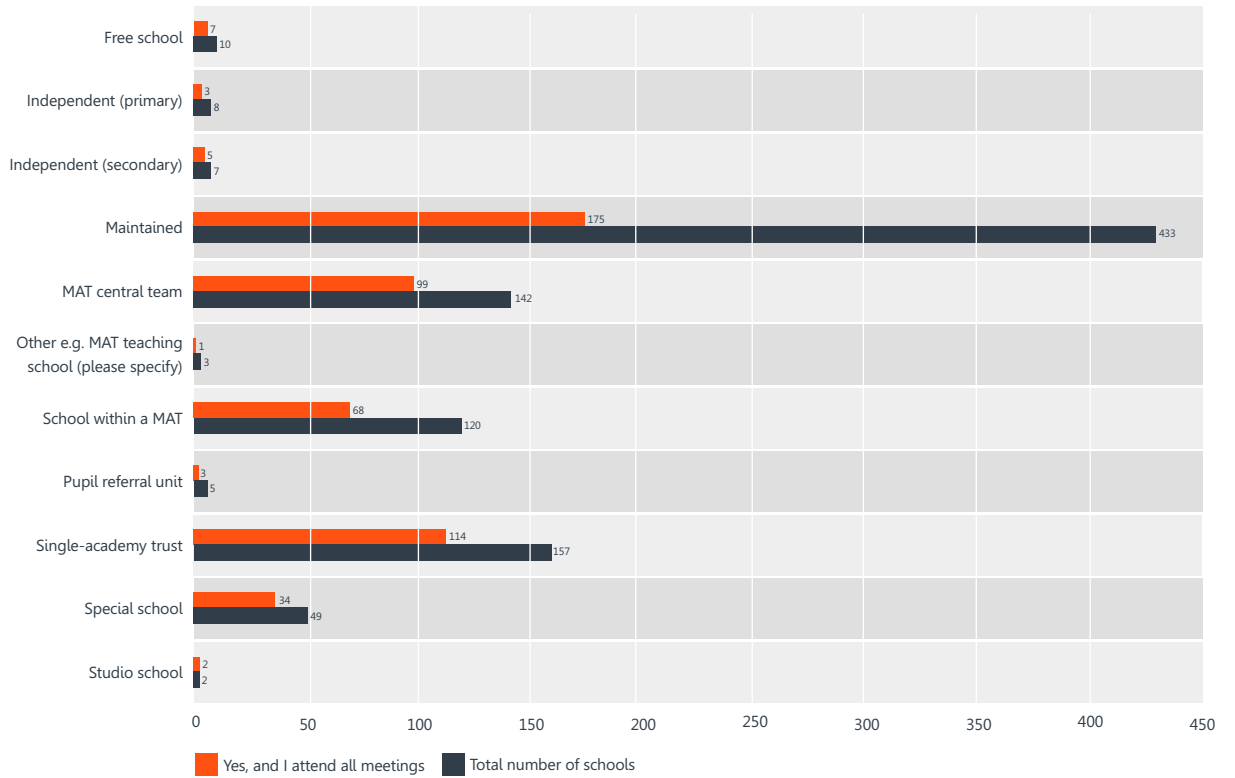


# 55%

Just over half (55%) said they attended all SLT meetings, and 29% said they were occasionally invited to specific meetings to contribute.



### Setting and strategic participation

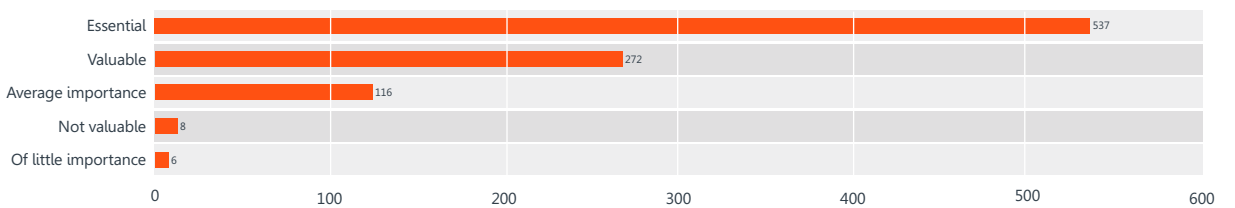


▲ Figure 3.40 Numbers of respondents who attend all SLT meetings

Of those respondents working in the maintained school sector (n=432), 41% attend all SLT meetings compared 73% of respondents working in a SAT (n=156), 57% within a MAT (school-based) (n=120), 70% working in a MAT central team (n=142) and 59% of those working in a special school (n=49).

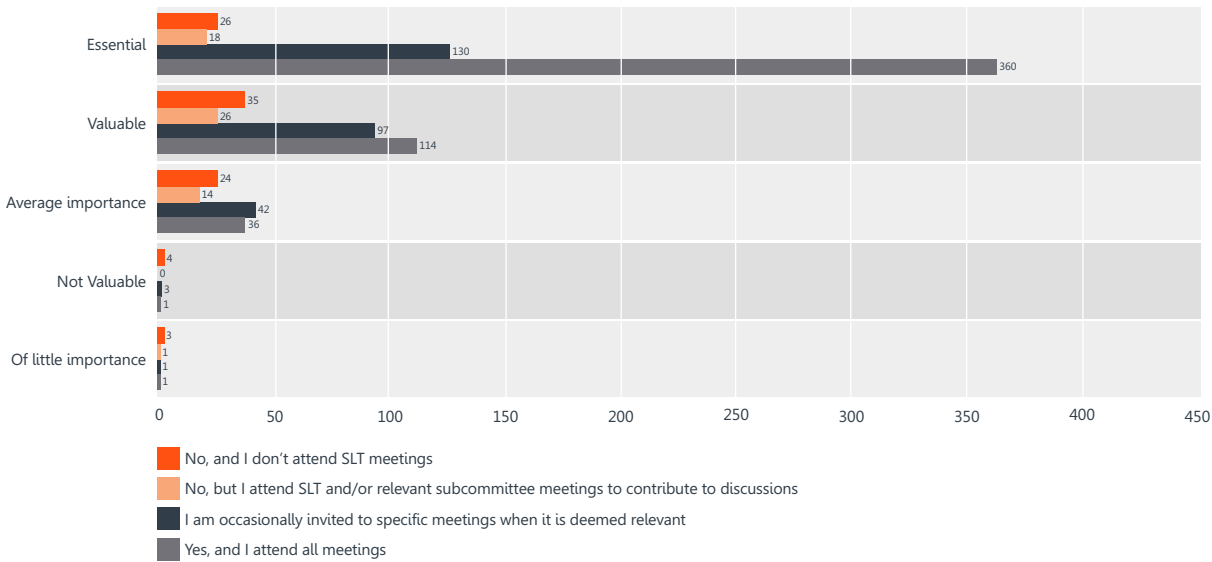
These data suggest a higher level of attendance to and participation in SLT meetings amongst respondents working in the academy and special school sector than their counterparts within the maintained sector.

### Interaction with senior staff and the governing body



▲ Figure 3.41 How SBMs feel their role is perceived by the SLT

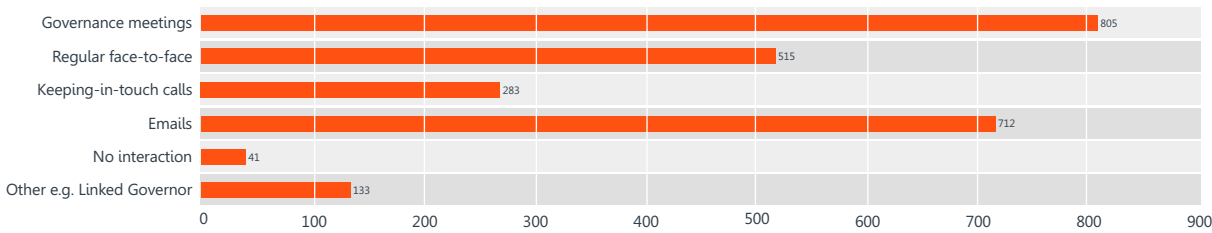
Respondents were asked to rate the level of importance they thought their SLT gave their role. Of those respondents who believe their role to be perceived as essential by senior leadership within their schools (n=534), 67% attend all SLT meetings with just 5% not attending any meetings.



▲ Figure 3.42 Comparison of how SBMs feel their role is perceived by the SLT and attendance of SLT meetings

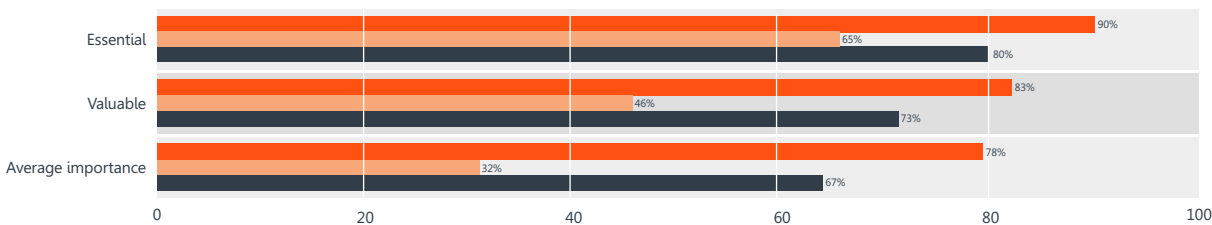
Of those who believe their role to be perceived as valuable (n=272), 42% attend all SLT meetings, with just 13% not attending any meetings. Of those who believe their role to be perceived as of average importance (n=116), 31% attend all SLT meetings, and 23% do not attend any meetings.

These figures suggest that the perception of the role within the school may be a factor in the level of SBP interaction with senior staff members within their schools and settings.



▲ Figure 3.43 How SBMs interact with the governing body

Respondents were then given the opportunity to provide multiple responses when answering the question regarding the means of regular interactions they have with their governing body (n=2489). Of these, 86% attend governance meetings, 55% attend regular face-to-face meetings, 30% keep in touch via phone calls, 76% keep in touch via emails and just 4% report no interaction. A further 14% cited alternative means of interaction such as linked governors.



▲ Figure 3.40 Comparison of how SBMs feel their role is perceived by the SLT and how they interact with the governing body

Of those respondents who believe their role to be perceived as essential (n=536), 90% attend governing body meetings, 80% communicate with governors via email and 65% have regular face-to-face meetings with governors. Of those who believe their role to be perceived as valuable (n=272), 83% attend governing body meetings, 73% communicate with governors via email and 46% have regular face-to-face meetings with governors. Of those who believe their role to be perceived as of average importance (n=115), 78% attend governing body meetings, 67% communicate with governors via email and 32% have regular face-to-face meetings with governors.

These figures suggest that the perception of the role within the school may be a factor in the level of SBP interaction with governors within their schools and settings.

### Qualification level and strategic participation

Of the respondents in maintained schools, 40% (n=175) indicated attending all strategic meetings in their setting. Of these respondents, 43% hold a L4/CSBM qualification, 26% a L5/DSBM, 52% a bachelor's-level degree and 8% a master's-level degree.

Those not holding a L5/DSBM or bachelor's degree were less likely to attend any meetings in those settings. In SAT settings, the pattern was similar.

Across all MAT settings, those attending all meetings (n=167) reflected a broader range of qualifications and similar participation to maintained schools across qualification levels with the exception of those in MAT central teams.

Of those MAT central respondents attending all meetings (n=68), 47% hold L6/L7 qualifications compared to those in individual school settings (39% SAT, 30% maintained, 31% school within a MAT). This suggests that qualification status in a MAT central team potentially has a slightly greater influence on strategic participation in that setting.

Overall, qualification levels did not have much influence across the majority of settings. However, there was evidence that suggests those respondents with level L5–L7 qualifications working 35+ hours per week were more likely to attend all strategic meetings in their setting and feel their role is perceived as 'essential' by the SLT than other groups of respondents.

Therefore, it could well be the interplay of higher qualification levels and working longer hours (35+ hours per week) that together influence full participation.





This report was published by ISBL in January 2020 following the collection and analysis of the findings during 2019.

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