Site-level School Business Managers: looking beyond the traditional view of educational leadership

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Introduction

Many schools will go through major rebuilding work in the next decade or so. They will become extended schools open to the community far beyond the school day and throughout the holidays. This requires new ways of working and a new approach to leading a school.

(Knight, J, UK Minister for Schools, 2007)

Set against the background of the 20 year anniversary of the ground breaking 1988 Education Reform Act, which introduced a National Curriculum, the Ofsted inspection regime, open enrolment and site-based funding of all state schools, the turbulent environment in which British schools operate is undisputed, as is the inevitable huge increase in workload at the school buildings’ level. Moreover, the current wide-ranging and challenging Government agenda for integrated children’s services, best exemplified by the change in the name of the Government Department responsible for schools from ‘Education and Skills’ (DfES) to ‘Children, Schools and Families’ (DCSF), places increased pressure on school leaders and has prompted proposals for wide changes in how schools are resourced and led.

The Children’s Plan released in December 2007 (DCSF 2007), outlined the agenda for the next few years and provides a clear indication that there will be no slow down in policy changes. The Plan demonstrates a focus on the one hand on the child as an individual, and the requirement on the other for schools to begin to look outwards and learn to collaborate both with each other and with other children’s services agencies. The Plan’s agenda has three separate strands:

1. The development of a flexible and modern curriculum that meets the individual needs of each child/young person;
2. The radical development of an integrated approach to children’s services;
3. The improvement of the environmental context for children/young people.

Additionally, there is now a leadership succession crisis looming in the United Kingdom (UK) as a large percentage of principals are due to retire in the next five years and teachers are reluctant to take on a role that appears to them to be overloaded and thankless (PricewaterhouseCoopers [PwC], 2007). Consequently, there has been a debate in England about the nature of school leadership which addresses not only how the school leadership team is actually made up but also, just how far the leadership role extends within and beyond the school.

Using data from a longitudinal study commenced in 1997, and from a recent baseline report on school business management (Wood et al, 2007) for the English National College for School Leadership (NCSL) this paper explores the implications of the buildings-level bursar/school business manager (SBM) role in providing a significant contribution to the British reform agenda as outlined by the English Training and Development Agency (TDA):

Better trained, highly motivated bursars, acting at a sufficiently senior level, have a dual role in developing an effective school workforce:

- firstly, by releasing headteachers and other members of the leadership team from a wide range of school management and administrative tasks, enabling them to focus on the transformation of teaching and learning, and
- secondly, by using their expertise in resource management to support the wider remodelling of staff deployment across the whole school.

(TDA, 2006:4)

The case is made for school business managers as a vital component of distributed and system leadership, resulting in a discussion of the implications for the transformation of their role in building leadership capacity to raise standards within and across schools.

Literature Review

Over the past 20 years, the twin movements of decentralized funding and site-level governance and the ever increasing pace of the knowledge economy in times of turbulent change (Drucker 2007), have, therefore, required a clear focus in the UK and elsewhere on leadership and management at the buildings-level and away from detailed control from the School District Office. The principle being that, in
order to achieve effective outcomes, resources and decision making are best located near, or at, the point of delivery. To support this movement, we have seen the incorporation, into school leadership development, of a group of notions often imported from the world of business such as flatter management structures, just-in-time approaches, striving for continuous improvement, performance management and other examples of what Lyotard (1984) refers to as Performativity, not to mention the insidious melding of the market system into public services giving rise to what has been termed New Public Management (Court 2004).

Such conceptualizations of education as a deficit system compared to the for-profit private sector perhaps inevitably leads to educational leadership development programs which utilize managerialist approaches focusing on an organizational model of input-output systems, the creation of public and professional Standards for all levels and fragmented “tick-box” instrumental training approaches typified by the initial National Professional Qualification for Headship (NPQH) of the UK NCSL. Hindsight will probably justify such an emphasis on developing the basic skills of management and leadership at buildings level in a devolved educational system as there has certainly been a dramatic improvement in student outcomes and leadership expertise (O’Sullivan 2005). However, there is an ever-present danger of a “war of all against all” between schools emerging in such a quasi-market in which life is, at least for the leaders, “nasty, brutish and short” (Hobbes 1651).

Maybe partly in response to this fear but also partly resulting from the networking between tutors, students and academics experiencing NCSL training and development, the last few years have seen the emergence of the concept of System Leadership, where senior school leaders begin to network with, and take responsibility for, the education system as a whole. A search on the NCSL website for “system leadership” generates 3452 hits, clearly illustrating the currency of this concept, the drivers for which come from such as Fullan (2005) and Hopkins (2006). The four inter-related aspects of system leadership cited are: Personalized Learning; Professional Teaching; Networks and Collaboration, and Intelligent Accountability (Figure 2):

![Figure 2: System Leadership (Hopkins 2006)](image)

It is perhaps ironic that the Chief Education Officer of Oxfordshire County Council in England was heard to say in a public meeting in the 1970s “If Local Education Authorities did not exist, schools would soon invent them”, especially as we are seeing the swing back from a focus on the autonomy of the individual school to collaborative and federated school approaches. This movement can be illustrated by the following passage from the NCSL Next Practice page on the NCSL website:

Our current thinking is that Next Practice in System Leadership involves approaches to leadership and/or governance that:

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1 Local Education Authorities - LEAs – are roughly the equivalent of School Districts in the USA.
do not, to the best of our knowledge, exist elsewhere in the same form (in terms of structures, scale, pace of change, or range of partners involved),

• enable groups of schools, or schools and other organisations, to sustainably deliver new, enhanced or more coherent services, and which

• aim to achieve significantly better outcomes for their young people and their communities than can be achieved by schools working on their own.

(http://www.ncsl.org.uk/research-index/research-nextpractice-index.htm)

Hence, the expertise and experience of practitioner-leaders are drawn upon for the benefit of the system as a whole, e.g: consultant leaders and executive principals; along with new forms of leadership that respond to specific circumstances.

Innovative thinking about concepts such as transformational and moral leadership are also beginning to influence how we think about leadership generally (Eisinger & Hula 2004, Fullan 2005) with leadership being acknowledged as an emergent property of an organized human system (Bennett et al 2003) i.e. it can be seen as a product, artifact or “force” which arises from the interaction of roles and people in the everyday life of any organization rather than as a pattern of responsibility set down by and emanating from the titular leader. There is, therefore, a huge rise in opportunities for leadership development at all levels from newly qualified teachers taking the first steps in section, departmental or whole school initiatives through middle managers to senior leadership roles, particularly via initiatives led by the NCSL in collaboration with higher education and training providers (Munby, 2005). This focus on leadership development has resulted in further insights into the conceptualisation of structures for, and cultures of, leadership in schools which range through a huge variety of approaches for example:

• moral leadership (Sergiovanni 1992)

• emotional leadership (Goleman 1996)

• transformational leadership (West et al 2000)

As well as a greater recognition of the value of the ‘softer’ elements of leadership concerned with intra- and inter-personal skills and approaches, most contemporary conceptualisations of leadership now incorporate at least an element of distribution throughout the organisation (Bennett et al, 2003, Harris 2008) including the notion of spreading leadership outwards from titular leaders such as principals to new formal positional leaders such as Advanced Skills Teachers, Performance Managers and Business Managers. These more fluid and informal approaches to leadership represent shifts from the rigid structures which characterize hierarchical, bureaucratic (Swieringa and Wierdsma 1992) and formal (Bush 2003) organizational cultures, more appropriate to slow, predictable change, towards ad hoc interest groups, eclectic and chaotic approaches (Bush 2003) necessary in times of rapid, turbulent change.

As part of this turbulent change, the PricewaterhouseCoopers (2001) report on teacher workload and the subsequent Time for Standards agreement (DfES 2002) contributed to the raised profile of support staff and their managers in schools and a realization at the government level, of the potential for the leadership role of school business managers (SBMs) as senior support staff in schools. This argument has been further sustained by evidence put forward in the latest PricewaterhouseCoopers Independent Study on School Leadership (PwC 2007) in which principals referred to the need to appoint SBMs to support the extended schools agenda and provision of wider community education.

A key change is to encourage the school to distribute responsibility away from the headteacher [principal]... This will allow bursars, and other members of the senior leadership team from teaching and support backgrounds, to fully exercise leadership functions and relieve the pressure on headteachers.

(PwC, 2007: 145)

The 2007 Report also confirmed that the principal’s role is becoming more complex and, paradoxically, this leads to a tendency for them to focus their attention at an operational level, despite a predicted shift from a traditional leadership approach to school federations and system leadership (Figure 1) to facilitate the multi-agency approach required by the Children’s Plan (DCSF, 2007). Principals themselves believe they are responding by distributing leadership in their schools but teachers and support staff do not agree. Over three quarters of elementary schools have no support staff on their leadership team and principals ‘can’t get their heads around people other than teachers in schools doing things’ (PwC, 2007:25).
This inability to understand and capitalize on the widening role and contribution of support staff in schools is echoed in academic literature. For example, neither of two significant articles, exploring the impact of workforce reform in schools (Butt and Lance 2005; Gunter et al 2005), discuss the role of SBMs although they are identified in the abstracts as suitable recipients of some of the teachers’ work overload. Bubb and Earley, in an earlier text, however, suggest that:

Perhaps when a deputy or assistant headteacher leaves, consideration could be given to replacing them with a business manager...Good business managers can save more money than it costs to employ them – potentially enabling more resources to be devoted to teaching and learning.

(Bubb and Earley, 2004:123)

Having replaced the past ad hoc-ery of learning by experience at the school buildings level with a coordinated system of standards-led training and development programs provided by the TDA and NCSL, it is interesting to note that we are entering a new era of “grow your own” expertise and received wisdom as regards system leadership which is eclectic, ad hoc, a-theoretical and, to some extent, impassioned and practice led:

The research literature currently available provides only a partial account of developments on the ground: the literature is more comprehensive in some areas than in others, it tends to be descriptive rather than analytic and has many gaps. This is in part because the pace of development is so rapid that many of the available studies are being overtaken by events. As yet, there can be little, if any, substantive evidence of the impact of emerging models of leadership on student outcomes or students’ experiences of schooling.

(Chapman et al, 2008:2)

Moreover, Chapman’s otherwise comprehensive and very recent review of the field has absolutely NO mention of bursars or school business managers – the best they get is an oblique reference in the general category of "other senior leaders" and, perhaps “ Federation Managers”. Given that initiatives such as Workforce Reform, Children’s Services, Extended Schools and Every Child Matters (all aspects which DO cite SBMs as important roles) are the underpinning components of the modern UK education system, this “invisibility” of the school business management profession is, at best, unfortunate. There are, however, some hopeful signs that education, as a system, is beginning to appreciate how business managers can add significantly to school leadership capacity, for example:

National Leaders of Education (NLEs) already work in system leadership not only through managing their own schools but also supporting other schools and leaders.
NCSL has a significant program supporting the development of school business managers. Recent research carried out for NCSL suggests that small schools working together to share a business manager can demonstrate significant efficiency gains and a series of demonstration projects are underway.

As part of its work on succession planning, NCSL is working with schools and local authorities to develop systematic approaches to address the high numbers of heads retiring in the next few years. In many cases this involves alternative models such as co-headship, executive headship and federations. (http://www.ncsl.org.uk/modelsofleadership-about-ncsl)

Thus the highly intricate networked approach characteristic of system leadership (Fullan 2005, Hopkins) which is now developing has the potential to increase capacity, creativity and innovation in the sector, and is also one in which SBMs could play a significant role in building leadership capacity, even though currently there is only peripheral awareness of support staff and their managers as a component part of any distributed leadership approach (Bubb and Earley 2004, Earley and Bubb 2004). The following sections describe the key findings from a long term empirical study into the school business management role in English schools.

**Research Design**

The data for this paper is derived from a longitudinal study begun in 1996 and draws principally on a recent baseline study of school business management, carried out in 2006-07 and commissioned by the TDA through the NCSL – the agency which implemented national SBM development programs. The 2007 Baseline Study of School Business Managers (Wood et al 2007) was commissioned to explore the characteristics, role, responsibilities and effectiveness of training of and the future for school business managers. A multi-methodology approach was used that would provide both quantitative and qualitative data. Existing data held by the University of Lincoln, Manchester Metropolitan University, Serco, the DCSF and the NCSL was accessed to provide insights into the population sample of school business managers in England, their training and development requirements and examples of effective management approaches. New data was also gathered to investigate, explore and clarify:

- the policy context and research requirements of the study.
- the numbers, distribution, characteristics, role, levels of operation, relationships, responsibilities, knowledge and attributes of school business managers.
- the impact of national policy on the school business management function.
- factors influencing the effectiveness of school business managers.
- alternative deployment strategies for the school business management function.
- school business managers' training and development needs.

The methodology for this baseline study, therefore, included a documentary search, an updated literature review of school business management and leadership; stakeholder interviews; a third national representative sample questionnaire; case studies; surveys of school districts, school inspections and training provision; analysis of DCSF data; analysis of NCSL Certificate/Diploma of School Business Management and University MBA assignments; and on-line and face to face focus groups. This paper reports on findings from data from the documentary search; an updated literature review of school business management and leadership; stakeholder interviews; a third national questionnaire; analysis of DCSF data and on-line and face to face focus groups.

The preliminary stakeholder interviews were carried out, ahead of the main investigation, with principal government, agency and professional association contacts in order to determine existing and future initiatives impacting the school business manager’s role or that might impact its development in the future. This approach also provided useful insights into stakeholders’ understanding of school business managers and the issues that might be addressed within the final report of the study. An initial documentary search was also undertaken to identify current initiatives that referred directly to school business management or which included elements affecting the recognised responsibility areas of school business managers.

Experience from previous literature reviews conducted as part of the University of Lincoln research on school business managers and published in O’Sullivan, Thody and Wood (2000:210-221) as well as that conducted for the NCSL Bursars Baseline 1 study (Wood et al 2004) indicated the paucity of material about school business management published in the UK. Thus the expectation was that the literature review conducted for this study would not be significantly different, despite the growing profile of school business managers.
business managers through the Workforce Reform agenda and the NCSL’s CSBM and DSBM training programs reaching over 4,000 school business managers (TDA News Release 12th July 2006). It was, therefore, agreed that the literature review, as well as searching for significant articles and books on bursars and school business management, would focus on exploring school business managers’ potential contribution to the areas of Distributed Leadership and Systems Leadership, both of which are at the heart of the NCSL and DCSF leadership strategy for the next decade. In pursuing this strategy, a number of significant sources was identified, either because they directly addressed the issue of the expanding role of school business managers or, conversely, made telling points about matters relating to school business management but failed to mention school business managers per se, focusing instead on principals or senior teacher-leaders.

The third 2006/7 national questionnaire is one of the key elements that provides the longitudinal aspect to the study as it enables comparison of business management in schools over a six year period. The first questionnaire was created in 1999 using data from the indicative case studies of the previous year along with the national standards, codes of conduct, skills and attributes developed by the National Bursars Association in collaboration with the US Association of School Business Officials (reported in O’Sullivan et al 2000). The original questionnaire was then used as a template for development of the 2003/4, and finally, the 2006/7 questionnaires. This newest questionnaire was also informed by the stakeholder interviews which provided an indication of new queries to be addressed. The questionnaire was delivered by post to a random sample of school types as listed in Table 1. The sample reflects that of the 2003/4 survey but has been updated to include academies and nursery schools.

<table>
<thead>
<tr>
<th>20% Sample</th>
<th>5% Sample</th>
<th>100% Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary: community, foundation, grammar, independent, voluntary aided, voluntary controlled</td>
<td>Medium and small elementary: community, foundation, independent, voluntary aided, voluntary controlled</td>
<td>CTC</td>
</tr>
<tr>
<td>Large elementary: community, foundation, independent, voluntary aided, voluntary controlled</td>
<td>Maintained nursery schools</td>
<td>Academy</td>
</tr>
<tr>
<td>Middle: community, foundation, independent, voluntary aided, voluntary controlled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special: community, foundation and non-maintained</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specialist schools</td>
<td></td>
<td></td>
</tr>
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</table>

Table 1: Sample of schools for the national survey 2006/7

Questionnaire returns are shown in Table 2. The largest percentage of returns was made by secondary and middle school business managers. Small elementary schools returned the largest percentage indicating that they did not employ a school business manager. The number of returns could have been higher if the questionnaire had not been administered over the busy run up to the Christmas holidays and the time of the Annual Schools’ Survey. A further contributor might have been the size of the questionnaire which had been significantly extended as a result of the stakeholder interview queries and the growing number of school business management activities.

Although the percentage of returns is not as high as the original 1999/2000 survey, the accuracy of the data returned is validated through comparison with the survey returns of 2000 and 2004 and tested against data collected from other methods during this study. For example, the on-line focus group and interviews during the observations were used to explore issues relating to job title, levels of operation and relationships with key stakeholders.

<table>
<thead>
<tr>
<th>Type</th>
<th>%</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nursery</td>
<td>20</td>
<td>30</td>
</tr>
</tbody>
</table>
Two elements of this study were identified as benefiting from a national debate that would provide insights into school business management across phases and in schools of different sizes. These elements are: a) factors influencing the effectiveness of school business managers and b) their impact in the school. Consequently, an on-line focus group discussion was held in February 2007 on the NCSL Talk2Learn website to discuss these elements. The month of February was chosen to enable new CSBM and DSBM candidates to take part in the discussion. The debate was prefaced by a short think-piece entitled: ‘Hands up if you Know What a School Business Manager is?’ The article discussed preliminary findings including, the diversity of the role, who understands the role, preferred titles and a framework for professional development. The following question was posed: ‘how can the contribution of school business managers be optimised?’ Three questions were asked to focus the discussion. They were:

i. Is there real awareness of the school business manager’s role and contribution at the school level, local authority level and nationally?

ii. How important is the title?

iii. In independent [private] schools, the business manager and headteacher work synergistically, is this approach desirable in state schools and, if so, how can it be widely achieved?

The discussion was monitored daily and summarised four times during the 2 weeks that the forum was held. Although the forum was open to all Talk2Learn users, most of the discussants were school business managers. The results were transcribed and imported into a software analysis program in order to identify themes.

Finally, a selected focus group of school business managers was assembled for a day-long seminar at the TDA to explore future initiatives and draw on their expertise of how they would respond. The sample was drawn from respondents to the national survey and school business managers known to the researchers and was informed by aspects of the findings of an Interim Report which included:

- Expert and new school business managers;
- Representation of males and females in line with the national population;
- School business managers from different regions across England including: Yorkshire & Humberside, London, East Midlands, Midlands, the South West, the East and the North East.
- Consultant business managers;
- Business managers from different phases of schools.

On the day that the focus group took place, the research team shared findings from the current research including contemporary influences on school business management as well as their characteristics, relationships, responsibilities and levels of operation appropriate to the school's needs. The participants then took part in an activity that considered the future for school business managers through the use of rich pictures. A second presentation discussed visibility and impact by exploring the effective school business management and professional development requirements. The ensuing second activity considered types of school business managers, professional development requirements and pushing the boundaries of school business management.

From the initial indicative study, completed in 1999, to the 2007 study, there has been a constant and varied flow of data each building on preceding studies, mapping the evolution of the profession and bringing new understanding to the role and its impact. Additional qualitative data fleshes out themes and issues by enhancing and contributing to the ethnographic context of SBMs in their workplace and understanding of the phenomenological meaning that school business management has within the field of education leadership. As a result, during this research, there has been an emerging commonality from
the data sets across the last ten years of study that informs the contribution of SBMs to supporting learning and teaching.

**Findings**

In 2006, the statistical report “School Workforce in England” (DfES 2006) reported a 20 per cent rise in support staff from 240,000 to 287,200, between 2004 and 2006. The largest and most rapidly rising group of support staff is teaching assistants, although nearly all other categories had also risen over this period. School business managers are the only group that has risen steadily, over the past three years, at around 500 a year (Figure 3). In common with other support staff, this rise equates to 21 per cent over the period 2004-2006 from 5,600 to 6,800. There is, therefore evidence that the numbers of SBMs employed in schools are increasing.

**Figure 3: Business Managers working in Schools, 2004 – 2006 (Source: DfES 2006)**

A finding of the first questionnaire (1999) was that there were over 100 titles for the person carrying out the education resource management role. Between 2004 and 2007, however, the percentage holding either ‘bursar’ or ‘school business manager’ titles has increased from 50 per cent to 69 per cent (Figure 4). A debate is taking place about the merits of the two titles. Independent schools traditionally use the term ‘bursar’ whilst state schools and NCSL prefer ‘school business manager’ (Table 3). Although there is discomfort about the use of the term ‘business’ in a school context, there are indications that ‘school business manager’ will soon become the preferred title as DCSF documents and the leading SBM professional association are now using the term school business management.

**Figure 4: A Comparison of Business Manager Titles used in Schools (2004 and 2007)**

Nevertheless, the debate is still taking place as to whether ‘bursar’ or ‘school business manager’ is the title that most accurately reflects the role.
I am still quite shocked at the amount of job titles given for the same role. What are we, when is it going to be decided once and for all who we are, and when is it going to be recognised by everyone in educational establishments how much we have to offer.

(Online focus group discussion, 2007).

Table 3 compares these titles and the arguments put forward to support them. Bursar is a traditional title that suggests a finance role and no preconceived level of operation. It is viewed as high status by independent and expert business managers. Alternatively, school business manager is a new title that suggests a wider role and management level of operation. It is perceived as high status by those evolving into the role and working in elementary schools.

<table>
<thead>
<tr>
<th>Bursar</th>
<th>School business manager</th>
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<tbody>
<tr>
<td>Traditional title</td>
<td>New title</td>
</tr>
<tr>
<td>Suggests a finance role</td>
<td>Suggests wide responsibilities</td>
</tr>
<tr>
<td>Is generic and does not imply</td>
<td>Suggests a specific level of operation</td>
</tr>
<tr>
<td>a specific level of operation</td>
<td>The title is specific to schools</td>
</tr>
<tr>
<td>The title is not specific to</td>
<td>The title is specific to schools</td>
</tr>
<tr>
<td>schools</td>
<td></td>
</tr>
<tr>
<td>Found principally in secondary</td>
<td>Found principally in secondary schools</td>
</tr>
<tr>
<td>and independent schools</td>
<td></td>
</tr>
<tr>
<td>Preferred title in elementary,</td>
<td>Preferred title in secondary schools</td>
</tr>
<tr>
<td>middle and special schools</td>
<td></td>
</tr>
<tr>
<td>Usually viewed as a high status</td>
<td>Usually viewed as a high status</td>
</tr>
<tr>
<td>title by those secure in the role</td>
<td>title by those evolving into the role</td>
</tr>
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</table>

Table 3: Comparison of bursar and school business manager

School business management is a generalist rather than a specialist role which SBM’s agree has evolved to support learning and teaching and development of the learning environment. All responsibilities are specialist areas with their own professional associations. Although, there are differences in how business managers operate in their schools, each has their own specific mix, depending on the school’s needs. Nevertheless, there are areas that are core to the role. Between 2000 and 2007, trends have begun to emerge in the degree of engagement with each responsibility area. For example, although finance management is still the principal responsibility area it now accounts for 19 per cent of activities, having reduced significantly from 27% and 25% in 2004 and 2000 (Table 4). This responsibility area, more than any other, is being squeezed in order to make space for increasing activity in other responsibility areas.

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<tr>
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<tbody>
<tr>
<td>Finance</td>
<td>27%</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Facilities &amp; Support Services including</td>
<td>20%</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Information Communication Technology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration &amp; Management Information Systems</td>
<td>18%</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Human Resources</td>
<td>16%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Marketing</td>
<td>9%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Risk</td>
<td>7%</td>
<td>8%</td>
<td>11%</td>
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<tr>
<td>Direct support of learning and teaching</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
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Table 4: A Comparison of Areas of responsibility (2000 - 2007)

These changes may imply that activities have reduced in two responsibility areas, finance management and facilities and support services management, in order to make space for increased activity in others, eg risk management, but this is not the case. Figure 5 is a representation of how many school business managers responded that they carried out activities within each responsibility area. The largest number of responses appears in the centre. Finance management remains the core responsibility area with
almost all school business managers claiming to carry out all activities listed. Activities within all responsibility areas, however, have moved closer to the core signifying that more school business managers are claiming to either carry them out themselves or supervise them. The responsibility areas with activities showing the greatest movement towards the core are ‘marketing’, ‘risk management’ and ‘management information systems’. This movement could be an indication that these responsibility areas are increasing in importance.

![Diagram showing activities carried out by School Business Managers (2007)]

Figure 5: Activities carried out by School Business Managers (2007)

The increase in systems management, and decrease in administration\(^2\) activity between 2004 and 2007 indicated in the analysis of responsibility areas is also demonstrated in aggregate calculations (Table 5). Between 2000 and 2004 there was a significant decrease in administration level activity and a significant increase in management and leadership activities. There has been little movement, however, between 2004 and 2007. There might be three causes for this apparent consolidation of levels of operation:

i. School business managers have developed their role to the point where the balance of level of operation meets the requirements of schools.

ii. Recruitment to elementary schools is impacting levels of operation, ie they will remain static until the role has become established in elementary schools and these new appointments have completed CSBM and, in particular, DSBM training.

iii. Further changes will be incremental if there are no further interventions such as the development of a consultant leader program which includes school business managers.

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<tbody>
<tr>
<td>Administration Functional operator,</td>
<td>60%</td>
<td>33%</td>
<td>31%</td>
</tr>
</tbody>
</table>

\(^2\) In UK English the term “administration” refers to routine clerical activities rather than senior leadership tasks.

Institute of Education, University of London, UK
SBMs also interact with a wide range of internal and external stakeholders although they prioritize their relationship with the principal, other support staff, the leadership team and the school district office. Each relationship contributes to their professionalism in different ways. The principal’s attitude defines their role in the school and for the relationship to be successful both must work at communicating their needs and negotiating their contribution to learning and teaching. Support staff provide SBMs with the capacity to discharge their responsibilities effectively, and working with the leadership team helps them understand the support they can provide to learning and teaching.

The relationship between the principal and school business manager is crucial in enabling optimal resource management and support of the learning environment. It is a relationship to be cultivated. Observations, stakeholder interviews and focus group discussions all demonstrated that principals and school business managers don’t need to have their offices located close to each other (although this helps) but regular communication is crucial. Schools are complex, turbulent environments and the pace of change shows no signs of slowing down. Without communication, therefore, it is difficult to align the principal’s vision with resources, and the business manager is unable to determine how best to provide the support required by the principal. For many business managers, the breakdown of this relationship would prompt them to resign.

Respect for the individual comes from the head. What would force me to leave the school? A head who doesn’t respect me.

(Stakeholder interview, 2006)

<table>
<thead>
<tr>
<th>Interaction</th>
<th>2004</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advise</td>
<td>17%</td>
<td>9%</td>
</tr>
<tr>
<td>Attend when required</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>Full member</td>
<td>26%</td>
<td>44%</td>
</tr>
<tr>
<td>No formal relationship</td>
<td>22%</td>
<td>16%</td>
</tr>
<tr>
<td>Member of a planning group</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Member of a management group</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Grand total</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Table 6: School Business Managers’ Interaction with Senior Management Teams (2004 & 2007)

For many school business managers, membership of the leadership/senior management team is the goal to which they aspire. Membership is regarded as a formal recognition of their professionalism and as the opportunity they need to understand and contribute to learning and teaching. Some business managers who are members of the leadership team experience a meaningful inclusion in discussions, whilst others find that recognition of their contribution is limited.

It seems that despite the nature of the school, the SBM role is not completely recognized and although we are invited to join the Senior Management Team, we still feel a little worthless and not taken very seriously. Generally we will always be the office staff or the admin team. There is not a real awareness of the role or the work involved in achieving the title.
Between the 2000 and 2004 studies, there was very little indication that business managers were working more closely with their leadership teams, but there have been real changes between 2004 and 2007 (Table 6). This increased interaction with the SMT could be a result of business managers completing the CSBM, demonstrating increased professionalism or a response to membership being a prerequisite to applying for DSBM. (NCSL, 2007). Fewer business managers have no formal relationship with the SMT with percentages reducing from 22% to 16% over the three years (Table 6). Of the 63% who have a formal relationship with the SMT, 43% are now full members, thus reducing the percentage who advise the SMT but don’t attend meetings or attend only when they are required. To business managers, the benefits to the school are clear.

I am in a very fortunate position in that my vision is also the vision of the Head and SMT and the support I receive is outstanding. As part of the core management team, I work closely with the Head and Deputy and find that an enormous benefit. I am able to link my areas of responsibility to other areas of the school to give support.

(Online focus group discussion, 2007)

Relationships with governors (i.e. the School Board3) are complex in that they are both formal and informal, and often incorporate more than one role (Table 7). For example, 26% of school business managers advise governors, but a further 22% are also either Clerks to the School Board or members of committees. There has also been a reduction in the percentage who advise and clerk, or who are members of committees and clerk, but the percentage of those who clerk or manage clerking only have remained constant. The percentage of school business managers who are members of committees has also fallen. The percentage of business managers advising governors has doubled and there has also been a 50% increase of those who are full governors.

<table>
<thead>
<tr>
<th>Interaction</th>
<th>2004</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advise</td>
<td>13%</td>
<td>26%</td>
</tr>
<tr>
<td>Advise and clerking</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Advise and member of committee</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Clerk or manage clerking</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Clerk or member of committee</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Member of committee</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>Full member</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>Full member and clerking</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>No formal relationship</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Not applicable</td>
<td>0</td>
<td>1%</td>
</tr>
<tr>
<td>Grand total</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Increase in relationship</th>
<th>Decrease in relationship</th>
</tr>
</thead>
</table>

Table 7: School Business Managers’ Interaction with the Board (2004 & 2007)

As school business management is an evolving profession, dialogue amongst each other is an important element in establishing understanding of the role as one stakeholder suggested:

"Are there problems around financial management? Schools bury their heads. How are bursars creating the opportunity to network and get the information they need?"

(Stakeholder interviews: 2006)

There is also a need to debate and establish eligibility for membership of the profession. Membership of professional associations is not as widespread as it could be (Wood et al, 2007). Networking is, therefore, 3 In England governance is legally located at school-buildings level (the Governing Body) in the form of a school council representative of the local community and education stakeholders.
important, particularly as there is usually only one business manager in each school. Despite this need for professional dialogue, 61\% of those school business managers who indicated how often they contacted other bursars, replied either ‘never’ or ‘seldom’ (Figure 7).

![Importance of Relationship: 2007, Numbers = 363](image)

Figure 6: School Business Managers’ Interaction with Each Other (2007)

Nevertheless, school business managers recognise the need to communicate more often as only 28\% cent said they thought that working with ‘other bursars’ was not important or was only moderately important (Figure 6). Encouragingly, 34\% thought that it was ‘very important’. This need to communicate is evident in the numbers and types of communications on talk2learn and in the numbers of local groups springing up around the country, for example, new Academies\(^4\) in London have developed a support network which their finance directors attend regularly and which reports directly to the DCSF.

Discussion and Conclusions

School business management is a complex, generalist but highly context specific role that has evolved and is still developing in response to the complexity of the school environment. Between 2000 and 2007, there has been a movement away from concern with principally finance, administration management and human resource management to a wider role that encompasses new core responsibilities of marketing and risk management. It is also clear that activities are not being lost to make way for increased responsibilities: business managers either absorb them or delegate to junior staff if funding is available. Effective school business managers are clear that all responsibilities should focus on improving learning and teaching and the learning environment. Levels of operation have also dramatically changed from overwhelmingly administration (routine clerking) to a balance of administration, management and leadership, between 2000 and 2007.

Furthermore, between 2000 and 2007, there has been an expansion in the range of responsibility areas, levels of operation and stakeholder relationships of SBMs, however, before the publication of the Independent Leadership Review (PwC, 2007), there was little evidence of a significant change in the level of debate in education leadership literature, about the contribution and impact of school business managers in schools, despite the development of specialized national training programs and an increased level of dialogue within the profession itself. Such awareness of the potential of SBMs to build leadership capacity and thus improve student outcomes is still very patchy

It is plain that the days of the finance manager located in an office at the end of a corridor who is able to shut the door to concentrate on the accounts are long gone. School business managers interact with a wide range of internal and external stakeholders although they prioritise their relationship with the principal, support staff and the district. Working with the senior management team is also important to them. Each of these relationships contributes to their professionalism in different ways. The attitude of the principal defines how their role is recognised in school and for the relationship to be successful both have to work at communicating their needs and negotiating their contribution to learning and teaching. Membership of, or a close working relationship with, the senior management team enables school business managers to understand better the core business of learning and teaching and therefore align the support they can provide with this. However, many elementary school business managers still express frustration at being excluded from this strategic group.

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\(^4\) Academies are fresh start schools, usually in areas of socio-economic deprivation and have some similarity to Charter schools, the industrial/commercial sector is required to contribute some £2 million ($3 million)
Table 8 maps the level of interaction of school business managers with stakeholders against the leadership approaches suggested by PricewaterhouseCoopers (2007, 49) given in Figure 1 above. There are indications that some leadership approaches result in similar relationships with school stakeholders, for example traditional and managed leadership focuses inwards and results in low interaction outside the school. These two approaches will soon change as more schools adapt to requirements to work with multi-agencies and optimise resources by working together.

<table>
<thead>
<tr>
<th>Approaches Relationships</th>
<th>Traditional leadership</th>
<th>Managed</th>
<th>Multi-agency managed</th>
<th>Federated</th>
<th>System leadership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support staff</td>
<td>High</td>
<td>High</td>
<td>Low/medium</td>
<td>Medium</td>
<td>Low/medium</td>
</tr>
<tr>
<td>Teachers</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>SMT</td>
<td>Low</td>
<td>Medium</td>
<td>High</td>
<td>Medium/high</td>
<td>High</td>
</tr>
<tr>
<td>Headteacher</td>
<td>Medium/high</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>Governors</td>
<td>Medium</td>
<td>Medium/high</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>Parents</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>Businesses</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>Community</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
</tr>
<tr>
<td>Local authority</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
</tr>
<tr>
<td>Agencies</td>
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<td>Low</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>TDA/DCSF</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Medium/high</td>
</tr>
<tr>
<td>Other SBM's</td>
<td>Low</td>
<td>Medium</td>
<td>Low</td>
<td>High</td>
<td>High</td>
</tr>
</tbody>
</table>

Table 8: Relationships according to school leadership approaches

Any future movement towards multi-agency, federated or system leadership approaches will require a radical alteration in stakeholder relationships for the school business manager. This change in approach raises questions about how their mode of operation will alter and the kind of support and training they will need to continue to operate effectively. Inside the school, well-trained support staff with delegated responsibility within their own areas of operation will be required to enable school business managers to focus on how they can best operate with external stakeholders. Initially, there will be a need for business managers who are skilled at clearly articulating the resource management requirements for school-based learning environments to other providers of children’s services. More importantly, they will need to understand how to strategically align resources with these other services within this new multi-professional environment.

In 2008, there is no evidence of a reduction in government initiatives within the British education sector. At the centre of the Children’s Plan (DCFS, 2007) is the principal, struggling to focus on learning and teaching whilst addressing burgeoning site-based management responsibilities and learning to adapt to a wider system leadership approach. Although some of the literature sources and research reviews steadfastly remain blissfully unaware of the school business manager’s potential role in contributing to building leadership capacity and student outcomes, in other significant initiatives school business managers have been identified as a vehicle for providing the operational support that principals and their leadership team need. SBMs, themselves are clear that their role, as the chief operating officer (Bennett and Miles, 2006), is to support learning and teaching and provide additional capacity for principals. Although the principal may be the main provider of the school’s vision, the SBM should be capable of aligning resources to support that vision, including direct line management of support staff, and hence acting as a multiplier in capacity building both at the school buildings level and across federations and networks.

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