

Apprenticeship Standard for School Business Professionals

1. Occupation Profile

School Business Professionals (SBPs) perform a role which is unique to schools, administering and managing the financial, site and support services within the school context. They provide essential support to school leadership teams, implementing their financial and business decisions.

SBPs may work in any school phase (primary, secondary, special) and in different school structures: single academy trusts, multi academy trusts (MATs), local authority maintained schools and federations, etc. Consequently, they can work in very different settings with varying numbers of people that they report to including the headteacher or School Business Director (SBD). Within this context, SBPs have a shared number of roles which shape their day-to-day activity to make this a homogeneous role in schools. The role typically includes:

- drafting and monitoring the school budget, setting up financial controls and reporting on performance to ensure best value for money is achieved; managing payroll, maintaining accounts and financial reporting to the headteacher and governors
- management of the school site to ensure that it provides a safe and suitable learning environment; procurement of goods and services to achieve best value and oversee contract management, e.g. staff, catering and maintenance contracts
- identification of income generation opportunities on a small scale, supporting the SBD in larger opportunities
- preparation of marketing materials and lead a range of marketing activities to add value and promote the school externally
- responsibility for managing office and other support staff and for developing and maintaining effective administrative systems, e.g. student record-keeping systems; implementation of school HR processes
- ensuring compliance with and implementation of safeguarding and Health & Safety policies so that all stakeholders work in a safe and healthy environment.

SBPs interact with all school stakeholders regularly to advise on and manage school business practices effectively. This requires them to understand educational issues as well as business management.

Their work is performed in the context of ensuring that public funds are used effectively. They must adhere to the principles of making the best use of school resources to enable all students to achieve their potential and to meet the aim of increasing social mobility for children and young people. SBPs must also understand that their role is of vital importance in relation to school governance and compliance. They must have a good understanding of educational policies and be able to implement change.

There is a range of job titles that this occupational profile relates to including a School Business Manager, HR Manager, Finance Manager, Office Manager, School Administrator, Business Support Officer, Bursar, etc.

2. Entry Requirements

Individual employers may set different requirements.

3. Requirements: Knowledge, Skills and Behaviours (KSBs)

| Knowledge | What is required for occupational competence |
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| Finance | Understands the range of educational funding streams available which are applicable to their educational setting. Has a working knowledge of accounting practices and understands how to apply business principles to the optimum use of funding to support learning outcomes. Understands school compliance issues. Recognises business efficiency and knows the range of data required to inform school business decisions. |
| Procurement | Knowledge of school procurement regulations and requirements and how to achieve value for money, including collaborative procurement. Understands how to manage collaborative processes with other schools in order to share good practice and secure financial efficiencies. Has an awareness of the complexities of procurement law. |
| Human Resources | Understands the complexities of teaching and support staff contracts, terms & conditions of employment and payroll. Understands educational HR policies, safer recruitment, and compliance with safeguarding priorities and equality legislation. Has an awareness of when to seek legal advice. |
| Managing Support Services | Knows the impact of educational policies at an operational level in order to support the school development plan. Understands the influence of educational regulatory bodies (DfE, Ofsted, etc). Is aware of Ofsted requirements and the implications these have for the workforce and planning in a school. Knows how to manage the DfE pupil and workforce census and their impact on the school. |
| Governance and Risk | Has practical knowledge of the supporting documentation governors need. Understands the process of risk management and procures and manages insurance cover for the school to mitigate risks as appropriate. Has relevant knowledge enabling compliance with charitable status and education law. Understands the impact of, and how to implement, safeguarding policy in a school environment. |
| Marketing | Understands how marketing can be used to underpin school funding. Knows the marketing priorities of their school and the impact marketing activities can have. Understands marketing activities to promote their school and takes into account e-safety when doing so. |
| Infrastructure | Awareness of the optimum deployment of resources targeted to raise pupil attainment. Understands the significance of physical facilities and digital processes in an educational setting, e.g. facilities repair logs, student data analysis, data security and safe use of social media. Has knowledge of relevant legislation that schools must comply with, such as Health & Safety, Freedom of Information, Employment and Data Protection policies. |
| Ethical Standards | Understands and demonstrates the highest standards of personal and professional conduct, and applies statutory regulations and provisions. |
| Skills | What is required for occupational competence |
| Financial and Operational Management | Manages strategies set by senior personnel and drafts budgets that reflect them. Manages the accurate recording and reporting of the school's finances to inform the senior leadership team who set the priorities for |

| Skills | What is required for occupational competence |
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| | school spending. Completes pre-audit checks. Produces reports that present information and data using a range of analytical processes. |
| Project Management | Plans, organises and manages processes to ensure value for money for the school whilst supporting education delivery, e.g. contract management, payroll, building maintenance and small development projects. Uses multiple IT packages and specialised schools MIS (management information systems) platforms. Prepares and collates reporting data. |
| Change Management | Embraces change in a school and influence others in a positive manner. Works constructively within a team environment. |
| Communication and Relationship Building | Communicates appropriately and effectively with a range of stakeholders including students, parents, governors/trustees, staff, government and local government departments, e.g. DfE/ ESFA, to gain positive outcomes. Has the confidence to question or seek clarification of aspects of school practice when unsure or unclear. |
| Strategic Management | Manages support services across an entire school whilst also providing guidance to colleagues on the most appropriate use of school funding. Effectively line manages small teams to drive efficiencies. |
| Behaviours | What is required for occupational competence |
| Change Catalyst | Keeps up to date with educational policies and embraces change. Self-motivated and supportive of others in working through change. |
| Decision Maker | Demonstrates a confident approach to decision-making and prioritisation, thus gaining the confidence of others. |
| Skilled Negotiator | Open, approachable and is able to build trust with others. Consults and seeks the views of others and values diversity. |
| Collaborative | Behaves in a collaborative way with other internal and external stakeholders. Promotes a team spirit and actively demonstrates professional competence in all settings and situations. |
| Resilient | Has the ability to adapt to different, changing and challenging situations whilst promoting the highest professional standards. |
| Challenger | Is willing to ask difficult questions whilst demonstrating an ethical, fair and consistent approach. Offers a business perspective and supports discussion and debate with professional knowledge and evidence. |

4. **Duration** - The apprenticeship will typically take 18 months to complete.
5. **Qualifications** - Apprentices without Level 2 English and maths on entry must achieve this level before taking the end-point assessment.
6. **Professional body alignment:** Candidates will be eligible to become a Full Member of the Institute of School Business Leadership (ISBL – formerly National Association of School Business Management) upon successful completion of the apprenticeship.
7. **Level** - This is a Level 4 apprenticeship.
8. **Review date** - The apprenticeship should be reviewed after 3 years.

Once achieved, successful individuals will be able to perform the role of the school business professional. The qualification may also be used as a stepping stone for those aspiring to a senior or strategic role in the school business profession.