



Department
for Education

Survey of School Business Professionals, 2021

Research report

June 2022

Department for Education



Government
Social Research

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Acknowledgments

This work relied on the time and goodwill of those working in schools and trusts during a pandemic. Thanks to all the financial leads in schools and trusts who completed this survey.

Additional thanks to IFF Research for their professionalism and flexibility.

Introduction and project aims

1. The Department for Education (DfE) is committed to working alongside schools and academy trusts to help them improve outcomes for pupils by getting the best value from all their resources. The offer of help and support – available on the department’s School Resource Management (SRM) webpage – is extensive and continues to develop with commercial arrangements and with guidance and tools that enable school professionals to understand and interrogate their own school or academy trust performance.
2. This research report follows previous findings from the department’s 2017 research which examined the similarities and differences between Single Academy Trusts (SATs) and Multi Academy Trusts (MATs), and the 2019¹ survey of school business professionals. Whereas the 2017² research covered a wide number of areas about the operation of SATs and MATs, this cross-sectional³ research survey (as well as the 2019 version) focusses on school business professionals (SBPs), specifically financial leads in schools and academy trusts, their skills and experience, their roles in strategic planning and financial management as well as exploring other aspects of procurement and recruitment by schools and academy trusts.
3. The report is split into five sections with findings broken down into primary SATs, secondary SATs, primary LA maintained schools and secondary LA maintained schools, and MATs. It will be of interest to all involved with resource management within schools and trusts as well as other stakeholder groups and representative bodies.
4. The research targeted the financial lead at LA maintained schools, SATs, and MATs. One individual, the financial lead, replied on behalf of each school or academy trust. These leads were chosen as the person having the best oversight of school or academy trust business-related operations and decisions. Some questions were specific to the respondent personally, for example, *their* qualifications or *their* involvement in strategic planning. Others were focused on the school or academy trust, for example, ‘how often does *your school/trust* review finances?’ Text used in the report and/or titles of Figures and Tables make it clear where this is the case.
5. Given this scope, this work should not be seen as a specific school business professional workforce census⁴, or as replacing the Department for Education’s School Workforce Census⁵.

¹ Cirin and Bourne (2019) *Survey of school business professionals*. Department for Education

² Cirin (2017). *Academy Trust Survey 2017*. Department for Education

³ i.e., is a snapshot of a single point in time of a population

⁴ As views from multiple SBPs at a school or trust were not collected

⁵ Department for Education (2021) *School Workforce Census guide*. Available at: <https://www.gov.uk/guidance/school-workforce-census> (accessed: 3rd March 2022)

6. Acronyms and other key terms used in this report either for brevity or to reflect a finding for a specific sub-group of respondents are:

- SBP – School business professional
- SRM – School Resource Management
- MAT - Multi-Academy Trust
- SAT - Single-Academy Trust
- LAMS – LA Maintained schools (i.e., LA primaries and LA secondaries as a group)
- Standalone schools – will refer to a LA primary, LA secondary, SAT primary, and SAT secondary
- Trusts – will refer to academy trusts, both SATs and MATs as a group
- All primaries – both SAT and LA maintained primary schools
- All secondaries – both SAT and LA maintained secondary schools
- LA (P) – LA primary
- LA (S) – LA secondary
- SAT (P) – Single Academy Trust primary
- SAT (S) – Single Academy Trust secondary

7. Findings allow the department to improve the functionality of school resource management tools and guidance based on different user need and identify where more additional support may be needed with specific groups of schools to have most impact.

Summary of the main findings

School business professionals (SBP) in schools and trusts: characteristics and qualifications

8. The majority of financial leads in standalone⁶ schools are School Business Managers (SBM) and will tend to have SBP-specific qualifications at Level 4, 5 or 6. There is a variation in this by phase of school as SBMs in LA secondaries are more likely to hold higher level qualifications (and not just school business profession specific qualifications) than LA primaries. In trusts, the Finance Director / Chief Financial Officer (CFO) is the financial lead and will tend to have higher level qualifications when compared to leads in LA maintained schools and are more likely to be a chartered accountant.

9. Nearly three-quarters (72%) of financial leads are not looking to study any new qualifications in the next three years. Of those that are, those in trusts are more likely to undertake an accountancy related qualification compared to those in a LA maintained school who are more likely to focus on an SBP specific qualification. Training in 'financial planning' is the priority for those in standalone schools with 'strategic planning' the priority for those in MATs.

10. Overall, just over half of financial leads (51%) have been an SBP for 10 years or more; 72% for 6 years or more. The majority, over two-thirds, are not intending to leave the profession in the next three years.

School business professionals and their role in strategic planning

11. Most standalone schools have a SBP as part of their senior leadership team (SLT). Of the four standalone groups⁷, they are least likely to be on an LA primary's SLT (56%). When examined by type of school, SBPs are more likely to be present on the SLT in a SAT compared to a LA maintained school. When examined by phase, they are more likely to be on the SLT of a secondary school⁸ (80%) than a primary (60%). Nine in ten MATs have an SBP on their executive leadership team.

12. Most SBPs are involved in 'some' or 'all' involvement in planning strategic direction irrespective of phase or type of school organisation. However, a phase of school

⁶ As noted on page 9, a standalone school refers to a LA primary, LA secondary, SAT primary, and SAT secondary, i.e., those not in a MAT.

⁷ LA primary, LA secondary, SAT primary, SAT secondary

⁸ Note: this is *all* secondaries (SAT secondary and LA maintained secondary) and all primaries (SAT primary and LA maintained primary). Data not shown on graph

issue emerges on the extent of influence: an SBP in a secondary school is more likely to be involved in *all* aspects of strategic planning than those in a primary. In MATs, and likely reflecting the seniority of their position⁹, 64% are involved in *all* aspects and 29% in *some* aspects of strategic planning.

Financial planning in schools and trusts

13. The senior leadership team of a standalone school will review its finances more frequently than will its governing board. SATs, both primary and secondary, will review finances more frequently than their LA counterparts. Trusts will review finances more frequently than LA maintained schools and are more likely to have an accountant on their governing board.

14. Just over half of all respondents (54%) currently use Integrated Curriculum Financial Planning (ICFP) in their school or trust. It is more likely to be used in MATs than standalone schools where it is more likely in SATs than LA maintained schools.

School Resource Management (SRM) resources and recruitment

15. The department is committed to working alongside schools and trusts to help them improve outcomes for pupils by getting the best value from all of their resources, and a suite of School Resource Management tools is available to support this.

16. Results show that trusts are more likely than LA maintained schools to use a greater range of these tools and guidance, and, overall, nine in ten respondents are using at least one of the tools. The Schools Financial Benchmarking (SFB) website is the most used by just over three quarters of respondents. About two-thirds find this site useful, using it to compare themselves to other schools and in strategic discussions at governing body level.

17. Respondents who have used View My Financial Insights (VMFI) - the majority being trusts¹⁰ - had a positive view of it, with over three-quarters finding it useful. Many VMFI users have been able to identify areas for possible efficiency improvement, reconsider areas where efficiencies could be found, and use it to inform budget setting.

18. The department created a range of recommended frameworks to help schools and trusts obtain value for money on regular purchases of goods and services; their introduction has been a gradual process. Findings show that Trusts are more likely than LA maintained schools to be aware of DfE recommended frameworks for purchasing goods and services. There is variation in awareness across all five school and trust

⁹ As a reminder, most responses from MATs were from the Finance Director / Chief Financial Officer

¹⁰ VMFI has been available to trusts longer than LA maintained schools as part of a planned rollout

groups of different recommended frameworks, likely reflecting how long different ones have been available. Overall, awareness of every framework is lower in LA maintained schools compared to trusts. One in five LA maintained schools do not know of any frameworks, and within this, there is a clear phase of school issue: LA secondaries are more likely to be aware of frameworks than LA primaries.

19. Of those that have used at least one framework (80% of respondents), almost two thirds said they gave assurance that they were buying in a way compliant with procurement regulations and just under half feel the frameworks helped them get better value. Feedback suggests there is scope to improve ease and speed of their use. If they need help procuring goods and services, trusts are more likely to use a private company or Public Sector Buying Organisation (PSBO) than a LA maintained school who mainly use the LA's services.

20. Just over two thirds of standalone schools have not tried to recruit any SBPs in the past two years. Of the remaining third 26% have not struggled but 11% have. Thirty-seven percent (37%) of MATs have not struggled to recruit, but 20% have.

The provision of services within schools and MATs

21. Standalone schools and trusts require a range of services and functions to operate effectively, and they decide on the most efficient ways of obtaining these. Legal, payroll, insurance, and catering are the services most commonly completely outsourced in standalone schools.

22. A primary school is more likely than a secondary school to completely outsource the following: human resources (42% vs. 13%); information and communications technology (ICT) (55% vs. 15%); finance support (47% vs. 33%); buildings maintenance services (33% vs. 16%), and school improvement services (45% vs. 27%). In most MATs, finance support, HR, legal, school improvement, payroll, ICT, and insurance are provided centrally through a top slice or on a charged basis. This is consistent across all MAT types, i.e., all primary MATs, all secondary MATs, or mixed MATs.

Methodology (inc. sample, responses, and weighting)

23. A fifteen-minute¹¹ online survey was scripted and housed by IFF Research on behalf of the department and based on questions asked in the 2019 school business professional survey with new additions reflecting emergent evidence needs. Fieldwork took place between 30th September 2021 and 9th November 2021.
24. The questionnaire was tested with a small sample of SBPs to ensure questions were suitable for the audience, with questions worded appropriately according to whether the respondent was an LA school, SAT, or MAT.
25. The stratified sampling process aimed to achieve as close to a representative sample as possible for each of the three main groups - MATs, SATs, and LA maintained schools - to generate statistically robust findings. LA maintained secondary schools and LA maintained primary schools with fewer than five hundred pupils were over-sampled to ensure a minimum base size large enough for analysis. Special schools, nurseries and alternative provision were not included.
26. Email invites to take part were sent directly to the financial lead at 795 MATs and 707 SATs. Invites to 2,227 LA Maintained schools were sent to the general school email address¹² with a request they be forwarded to the financial lead at the school. All invites were sent by DfE staff. Each school or trust had an individual survey link specific for them. This allowed one response per organisation and facilitated the specificity of reporting detailed in the sections that follow.
27. Two email reminders encouraging completion were sent by DfE staff during October 2021 and one in early November 2021. These were supplemented by follow up calls by IFF Research among LA schools to encourage completion online between 1-5th November 2021 as the response was lower in this group compared to SATs and MATs.
28. Table 1 below shows the splits of the 929 total respondents who completed the survey: 195 from SATs, 275 from MATs, and 459 from LA maintained schools.

¹¹ Median completion time 14mins 20 seconds.

¹² For example, admin@myschool.co.uk, office@myschool.co.uk

Table 1: Response breakdown

Phase	SATs	MATs	LA maintained school	Total
Primary	79	85	314	393
Secondary	116	30	145	261
Mixed	-	157	-	157
No phase info	-	3	-	3
Total	195	275	459	929

Source: All survey respondents - financial leads at standalone school or MAT

29. Twenty six percent (26%) of those sampled responded. Variation by each of the three main respondent groups is shown below in Table 2. In this table, the starting sample excludes those where the invite email sent by the department was 'undeliverable,' meaning the invitation to take part was not received by the school or trust.

Table 2: Response rates

Phase	SATs	MATs	LA maintained school	Total
No. responses	195	275	459	929
Starting sample	675	753	2,169	3,597
Response rate	29%	37%	21%	26%

Source: All survey respondents - financial leads at standalone school or MAT

30. Fifteen partial open-end questions (i.e., those with 'other please specify' to a question with a set number of response options) and three full open-ended questions were coded by IFF Research; the latter involved creation of a code frame to group the types of responses given.

31. Using Get Information About Schools (GIAS) data and data provided by the Department, the overall population of schools in the key groups of analysis were calculated by IFF Research to set the weighting targets. The completed survey responses were then weighted according to these targets to ensure they were

representative of the overall population. The weighted profile is shown in Table 3 below in the far-right column and compared against the unweighted profile of those completing the survey.

Table 3: Weighting profile

Group	Survey completes	Weighting targets
SATs		
SAT – Primary	41%	42%
SAT – Secondary	59%	58%
MATs		
MAT – Mixed	58%	46%
MAT – Primary	31%	38%
MAT - Secondary	11%	16%
LA Maintained Schools		
LA – Primary	68%	93%
LA - Secondary	32%	7%

Source: Get Information About Schools

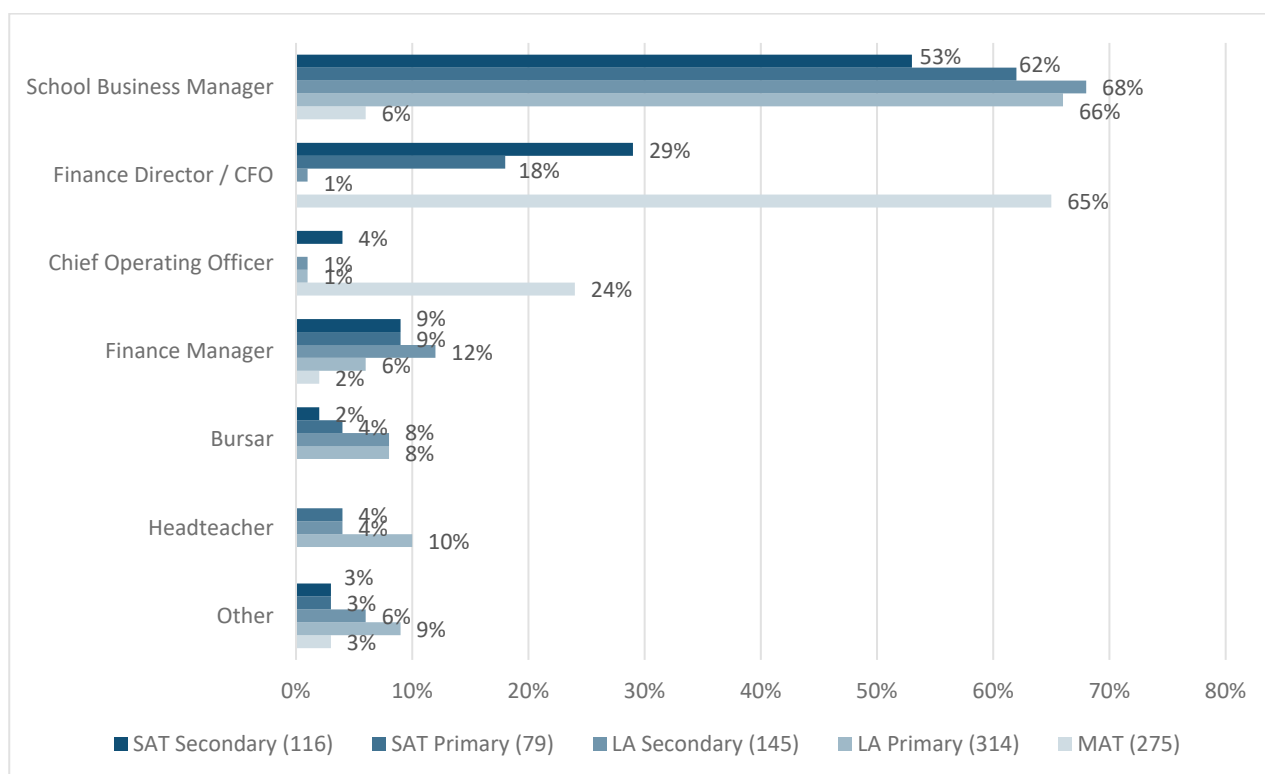
School business professionals in schools and trusts: characteristics and qualifications

Job titles

32. Respondents were provided with a list of roles and asked to select which best reflected their job¹³. Figure 1 below shows the job titles and proportions of respondents in each of the five groups of interest from standalone schools and MATs referred to throughout this report.

33. The school business manager responded for most standalone schools: 66% of LA primaries, 68% of LA secondaries, 62% of SAT primaries and 53% of SAT secondaries. In MATs, the Finance Director / Chief Financial Officer tended to respond (65%), with the Chief Operating Officer responding in just under a quarter (24%) of instances.

Figure 1: Job title of respondent by organisation type



Base: All respondents - 929

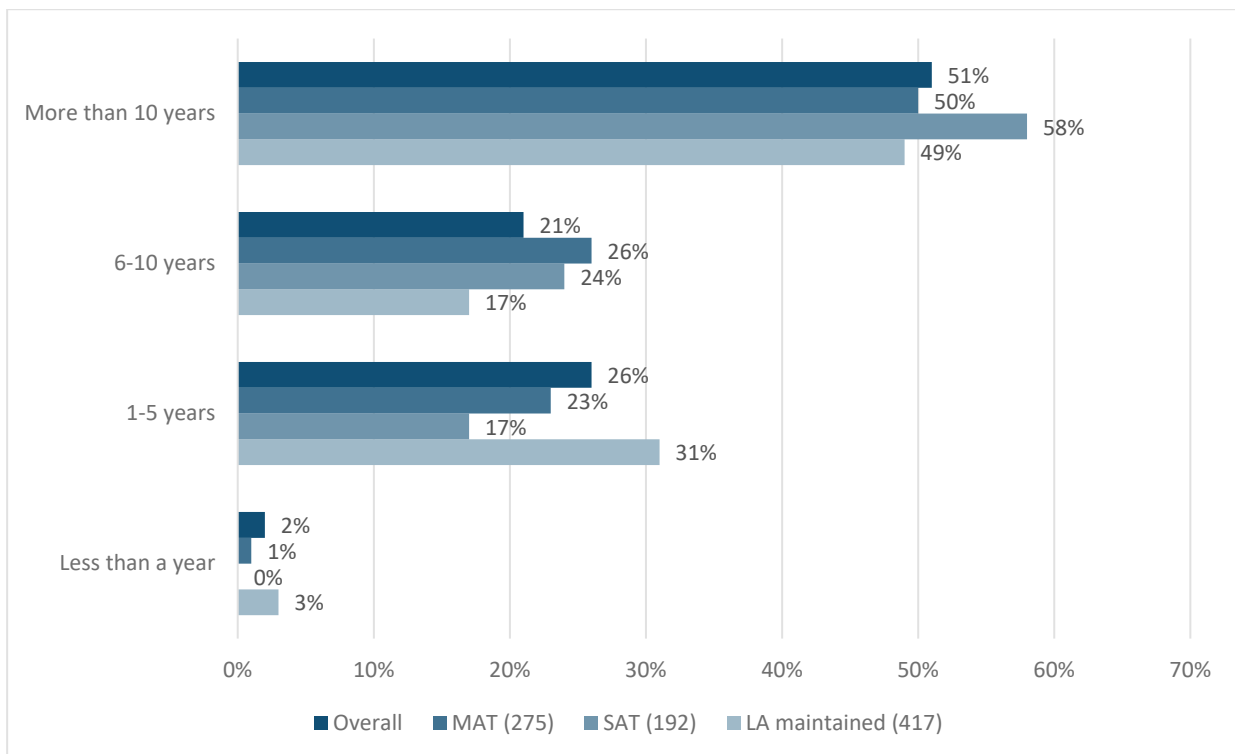
¹³ This list used reflected the most common school business professional job roles

Working in school business management – experience and intentions

34. Not asked in 2019¹⁴, nor a requirement of the DfE’s School Workforce Census, Figure 2 below shows the extent of respondents’ experience working as school business professionals rather than how long they have been working in their current role.

35. Responses show they are experienced. Overall, 51% have been a SBP for 10 years or more; 72% for 6 years or more. Those in SATs and MATs are more likely to have 6+ years’ experience than the leads in a LA maintained schools (82% SATs and 76% MATs vs. 66% LAMS). This likely reflects the seniority of their position in the trust as noted in Figure 1 above.

Figure 2: Length of time respondent has been a school business professional

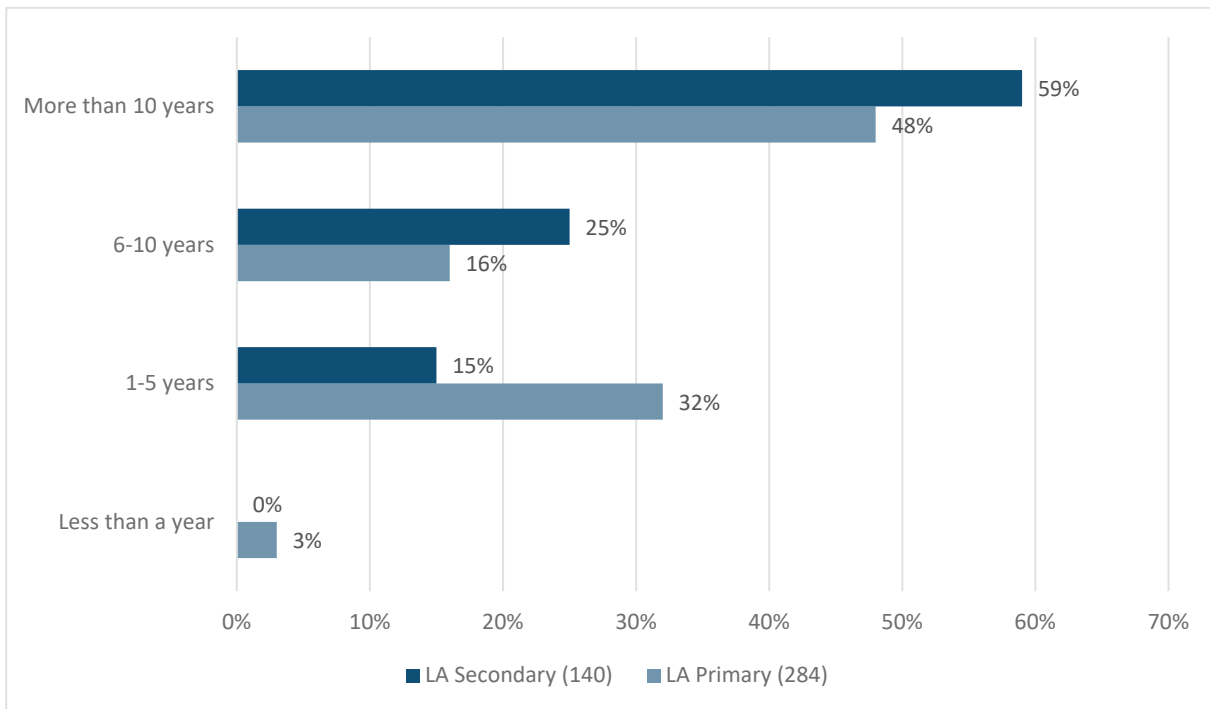


Base: All respondents – 929

36. The relatively low proportion of SBPs with 6+ years of experience (66%) in LA maintained school reflects school phase. The financial lead in a LA primary is relatively less experienced than one in an LA secondary – 84% of LA secondaries have more than five years school business experience compared to 64% in LA primaries. The financial lead in one in three LA primaries has one to five years’ experience. See Figure 3.

¹⁴ Cirin and Bourne (2019) *Survey of School Business Professionals*. Department for Education

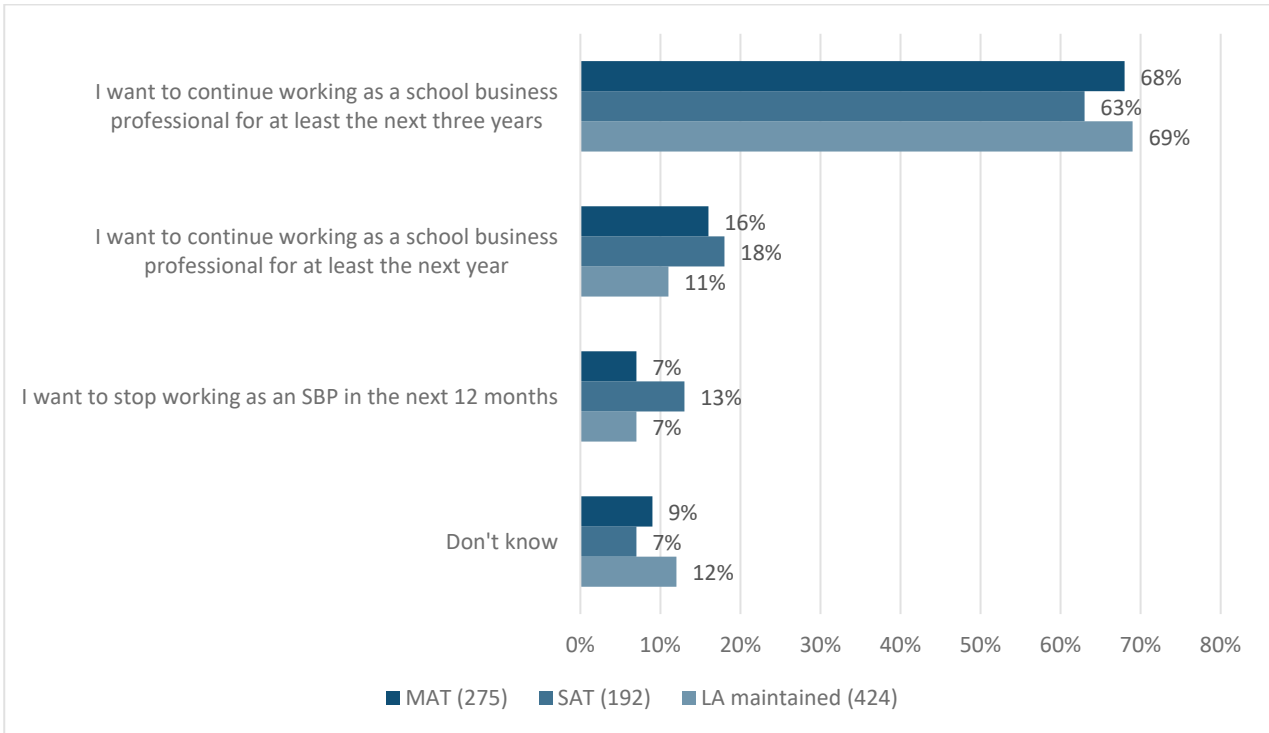
Figure 3: Length of time respondent has been a school business professional - LA primary vs. LA secondary



Base: Respondents from LA schools only. Base sizes shown

37. Most respondents (69% in LA maintained schools, 63% in SATs, and 68% in MATs) wish to continue working as a SBP for at least the next three years (shown in Figure 4 below). There is no significant variation in these proportions when examined by phase of LA school, phase of SAT, or phase of MAT.

Figure 4: How long respondents intend to work as a school business professional in their current school/ trust or another school / trust



Base: All respondents - 929

Qualifications, memberships, and intentions to study and train

38. All respondents were asked to confirm whether they held certain qualifications or memberships from a relevant list, shown in Table 4 below. Reporting is shown by the two major respondent groups: School Business Manager and Finance Director / Chief Financial officer. Percentages will not add up to 100% as the respondent could select more than one qualification or membership.

39. A School Business Manager will tend to have school business profession specific qualifications at level 4 or level 5. When compared to a School Business Manager, a Finance Director / Chief Financial Officer will tend to have higher level qualifications and be more likely to hold a chartered accountancy membership.

Table 4: Qualifications and membership - School Business Managers and Finance Director/ Chief Financial Officer

Qualification and level	School Business Manager	Finance Director / Chief Financial Officer
Level 4		
Level 4 Diploma in School Business Management (formerly known as CSBM)	42%	17%
Level 4 CIPFA Accredited Finance training for SBMs	4%	4%
Level 5		
Level 5 Diploma in School Business Management (formerly known as DSBM)	18%	16%
Level 5 CIPD certificate in Human Resources for School Business Professionals	1%	1%
Level 6		
Degree in a non-finance, business, or HR related subject	17%	20%
Degree in a financial, business, or HR related subject	16%	29%
Level 6 Diploma in School Business Management (formerly known as ADSBM)	2%	5%
Level 7		
Level 7 CIPFA Certificate in School Financial and Operational Leadership	3%	7%
Masters in a non-financial, business or HR related subject	3%	3%
Masters in a financial, business or HR related subject	1%	3%
Masters in Business Administration	2%	4%
Chartered Institute for Management Accountants (CIMA) – professional qualification	3%	12%
Memberships		
Membership of Chartered Institute	3%	6%
Membership of the Chartered Institute of Public Finance and Accountancy (CIPFA)	1%	7%

Membership of the Institute of Chartered Accountants in England and Wales (ACA)	3%	22%
Chartered Association of Certified Accountants (ACCA)	3%	15%
Other response options		
Other	6%	9%
None of above	16%	2%

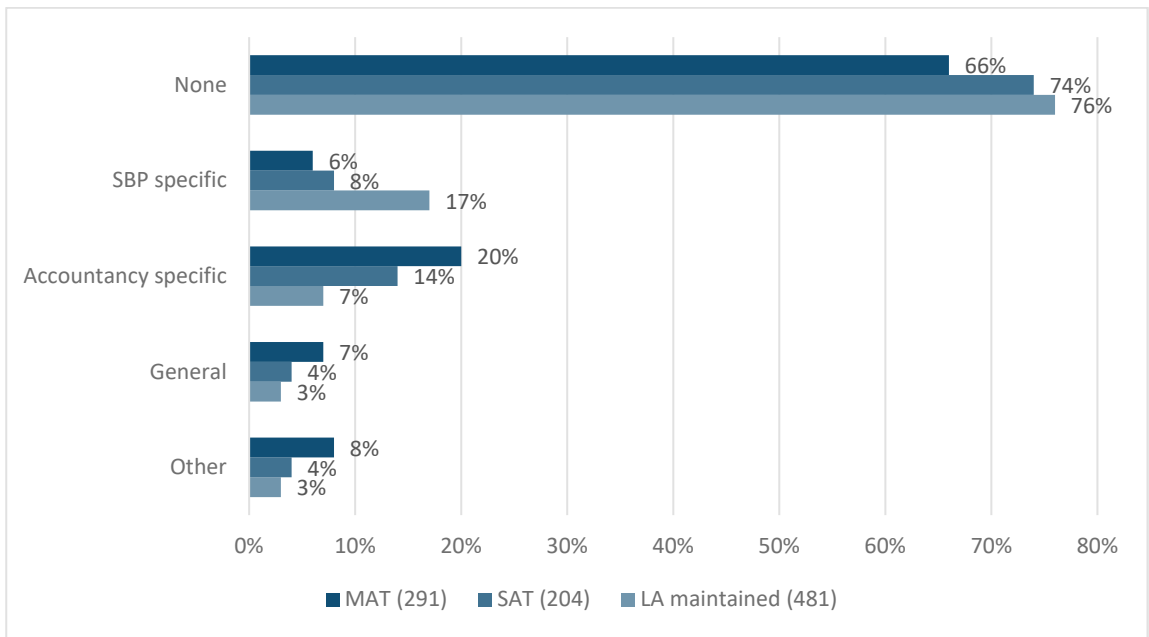
Base: Respondents identifying as a SBM in a standalone school or MAT - 432; respondents identifying as the Finance Director /Chief Financial Officer in a trust – 228.

40. Most respondents are not looking to study for additional qualifications in the next three years: MAT, 66%; SAT, 74%; LAMS, 76% (Figure 5 below). Of those looking to study, respondents from LA maintained schools are more likely to undertake an SBP-specific qualification than are respondents from trusts: 17% in LAMS vs. 6% in MATs and 8% in SATs. One in five respondents from MATs intend to study an accountancy-specific qualification.

41. The longer the respondent has been in post, the less likely they are to undertake a new qualification – 78% of respondents in post more than 10 years do not intend to study for any further qualifications.

42. It is worth noting that many trusts and schools will have more than one member of staff who would be classed as a SBP but gathering data about the study intentions of every SBP was out of scope of this research.

Figure 5: Qualifications respondents intend to start studying in the next three years



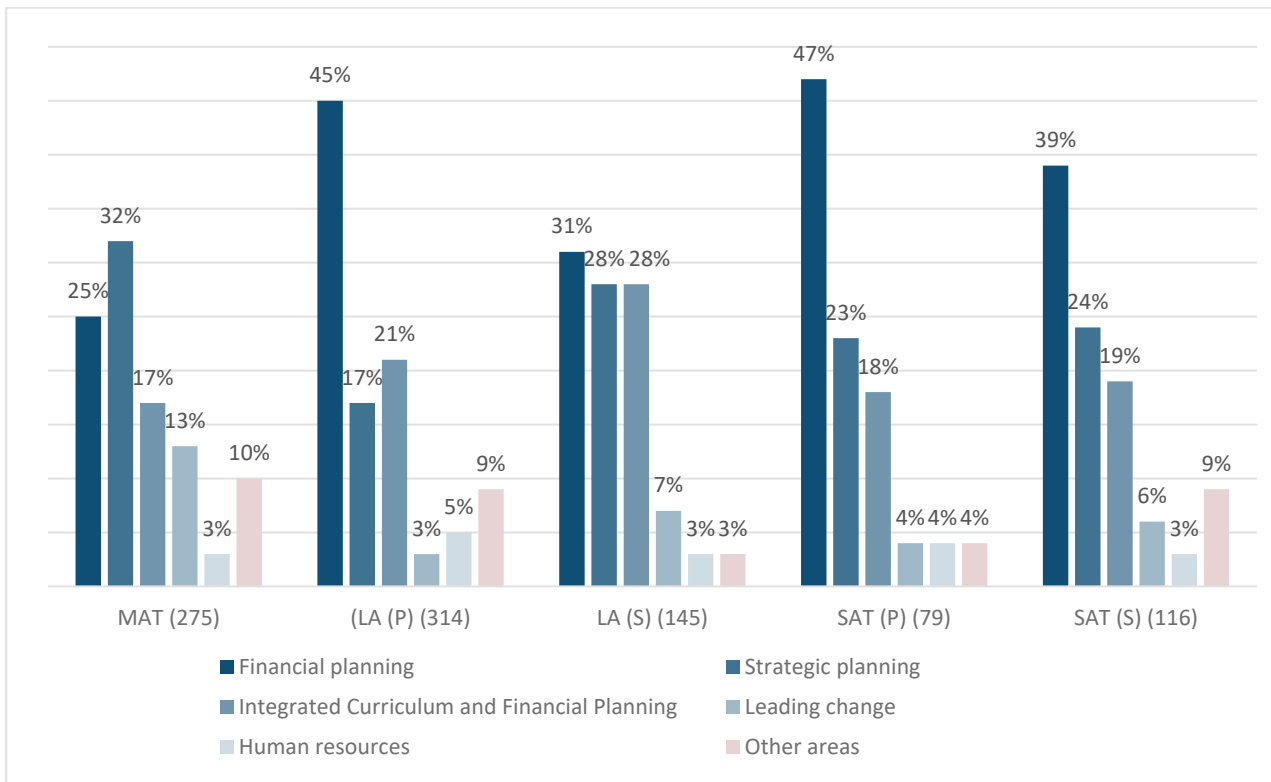
Base: All respondents - 929.

43. Whilst most are not looking to study further, continued professional development through training remains important. Figure 6 on the following page shows respondent views on the most important area for training for the SBP (the profession in general, not them individually).

44. The two most popular areas were ‘financial planning’ and ‘strategic planning.’ However, where the focus should be varied depending on whether the respondent was from a standalone school or MAT, likely reflecting the perspective of their job role and its responsibilities. To illustrate, in MATs, where most respondents were the finance director / chief finance officer, ‘strategic planning’ was the most common response (32%). In standalone schools, where school business managers tended to respond, it was ‘financial planning.’

45. There is, though, variation within the standalone school group. Both LA and SAT respondents in primary schools were more likely than those in LA secondaries to highlight ‘financial planning’ as most important training need for the school business profession.

Figure 6: Most important area for training in the SBP profession as a whole



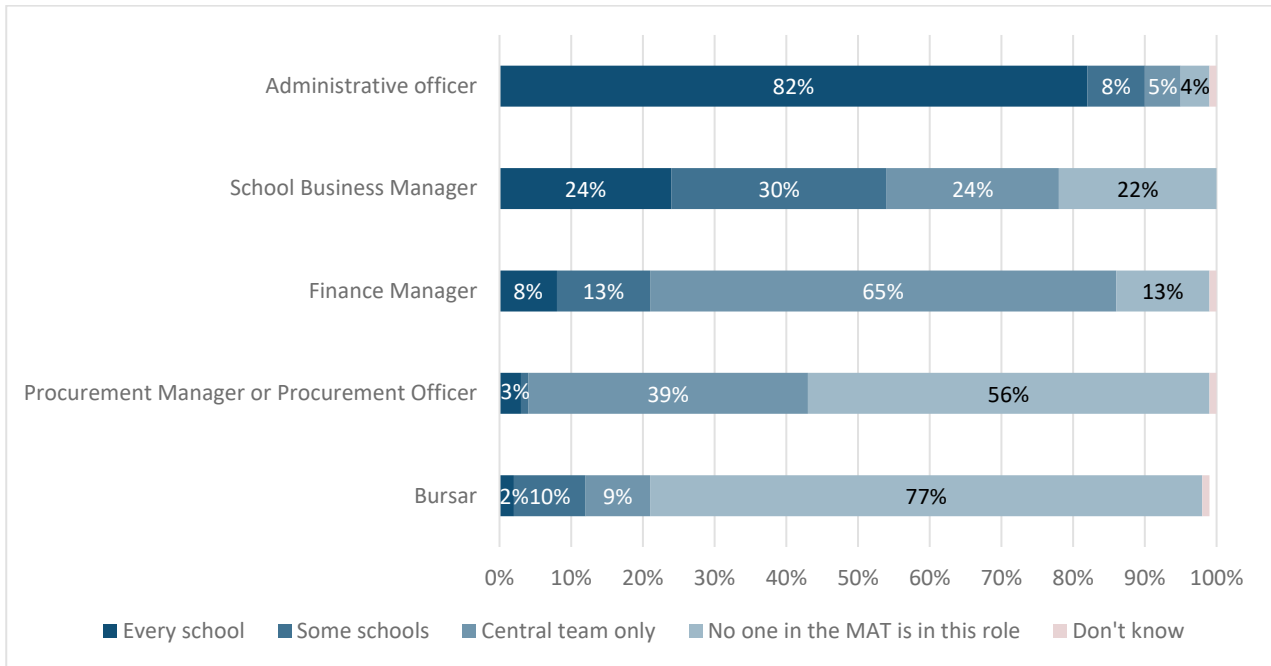
Base: All respondents - 929

SBPs within MATs

46. Not collected in the 2019 survey of school business professionals, this survey asked MAT respondents whether they employed certain school business profession roles, and if they did, how these were distributed across the MAT. Specifically, were they in every school, some schools, just the central MAT team or was no-one employed in that role?

47. Results show that just under a quarter of MATs have a school business manager in every school in a MAT, 30% have them in some schools, 24% in the central team only, and 22% do not employ anyone with this job title. Finance manager roles tend to be centralised – in 65% of MATs this role is in the central team only, and the majority of MATs do not have a procurement manager / procurement officer (56% do not) but where they do, they tend to be centralised (39%), rather than in every or some schools.

Figure 7: Locations for key school business professional roles within MATs



Base: All MATs - 275

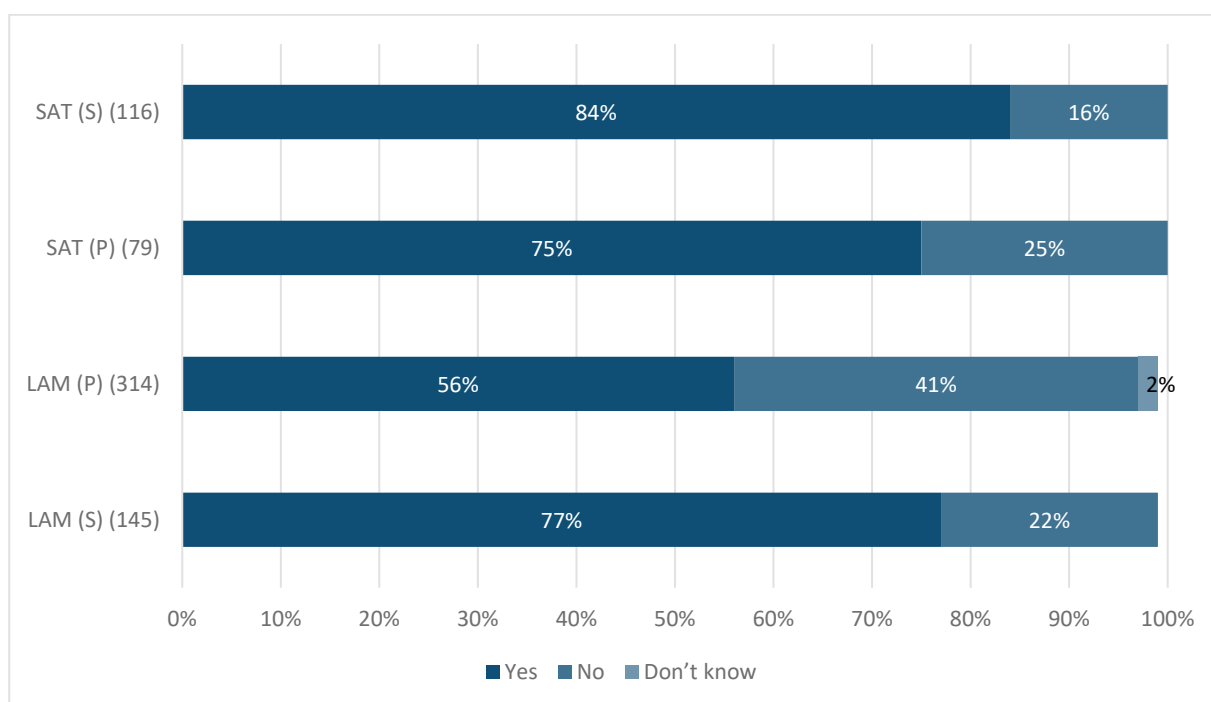
School business professionals and their role in strategic planning

SBP inclusion on the senior leadership team (SLT)

48. Respondents in standalone schools were asked whether they, or another SBP are on the SLT of the school. Figure 8 below shows responses split by phase and type of standalone school.

49. Results show that most standalone schools have an SBP as part of their SLT. Of all the four standalone school types shown, they are least likely to be on an LA primary's SLT (56%). When examined by type of school, they are more likely to be on the SLT in a SAT compared to a LA maintained school, and when examined by phase, they are more likely to be on the SLT of a secondary school¹⁵ (80%) than a primary (60%).

Figure 8: Are you or another school business professional a member of the school's leadership team? Phase of school

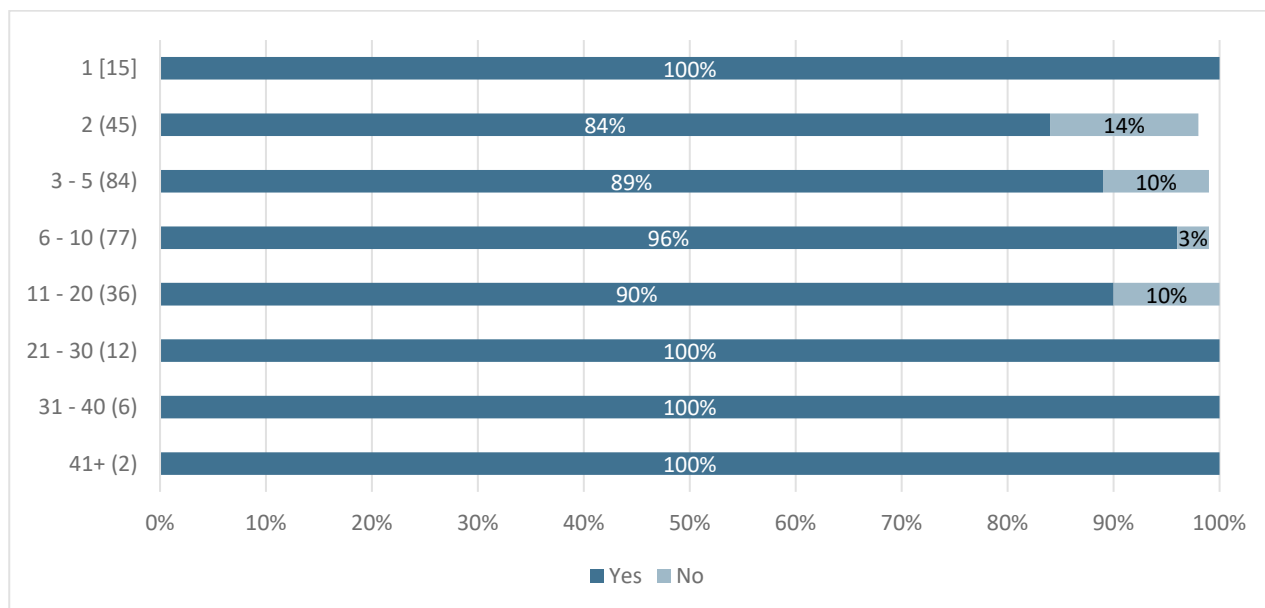


Base: All primaries, all secondaries. Base sizes shown.

¹⁵ Note: this is all secondaries (SAT secondary and LA maintained secondary) and all primaries (SAT primary and LA maintained primary). Data not shown on Figure 8.

50. Figure 9 below asks the same question about SLT membership but is specific to MATs. MAT size is shown on the Y axis. Overall, the vast majority (92%) of MATs have a SBP on the SLT. Whilst there are some slight variances in the proportion of different size MATs who have an SBP on the executive leadership team, those between-group differences are not statistically significantly different.

Figure 9: Are you or another school business professional a member of the executive leadership team? MATs



Base: Responses from financial leads in MATs only - 275

SBP involvement in strategic planning

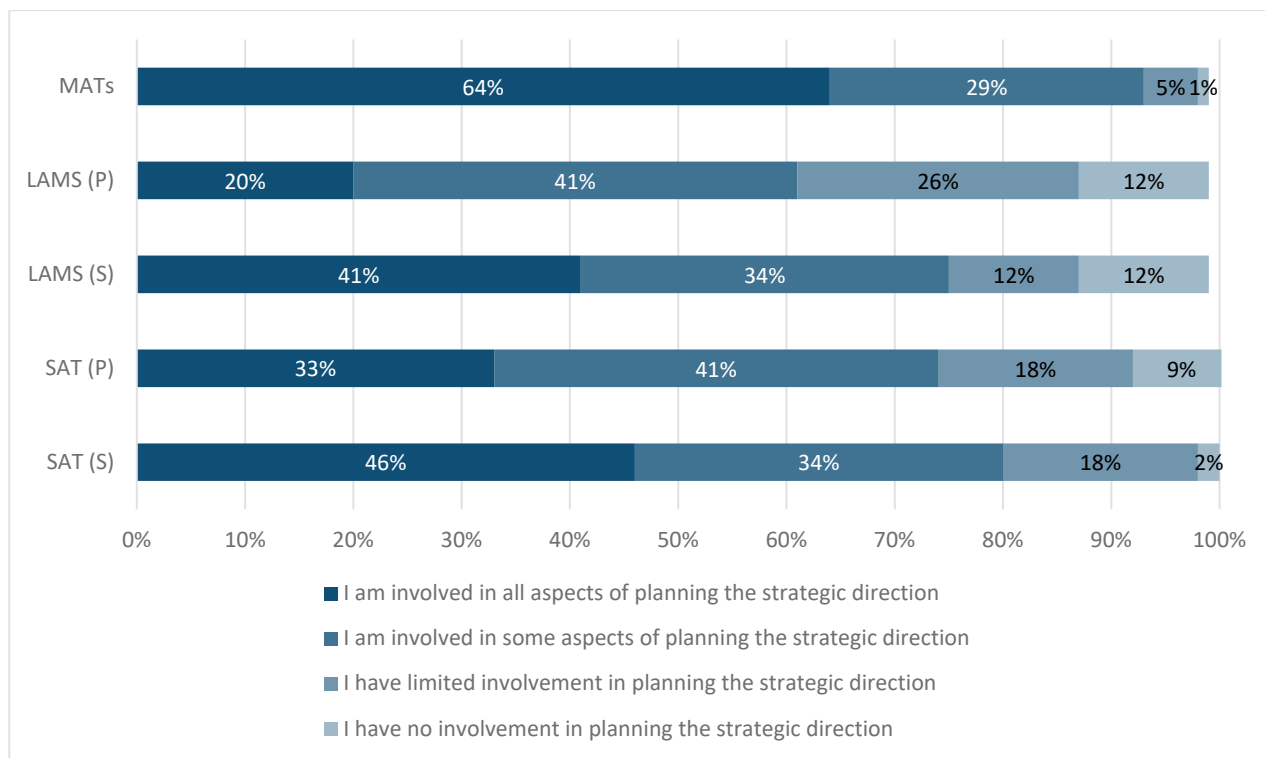
51. All respondents were asked about the extent to which they are involved in planning the strategic direction of the school or trust and results are presented in Figure 10 below.

52. Most respondents are involved in 'some' or 'all' involvement in planning strategic direction. In MATs, and likely reflecting the seniority of their position¹⁶, 64% are involved in 'all' aspects and 29% in 'some' aspects. However, a phase of school issue emerges on the extent of influence: a financial lead in a secondary school is more likely to be involved in 'all' aspects of strategic planning than those in a primary. Some in standalone schools have no involvement in strategic planning. This is the case in approximately one in eight

¹⁶ As a reminder, the majority of responses from MATs were from the Finance Director / Chief Financial Officer

LA primaries, one in eight LA secondaries, one in eleven SAT primaries and one in fifty SAT secondaries.

Figure 10: Extent of involvement in planning strategic direction in standalone schools and MATs



Base: All respondents - 929

53. To explore the issue of involvement further, all respondents were also asked an open question on what they thought are the barriers to them, or other SBPs in their school/trust, being more involved in planning the strategic direction. Just over 60% (574) answered.

54. Lack of understanding from schools / trust about SBP role was cited by 15%; their workload / lack of time, 14%; an SBP not considered as important as teaching staff, 13%; lack of experience / knowledge of curriculum, 10%; the nature of decision-making systems in a school/trust, 8%; and the SLT more focused on teaching/curriculum, 6%. The remainder did not know.

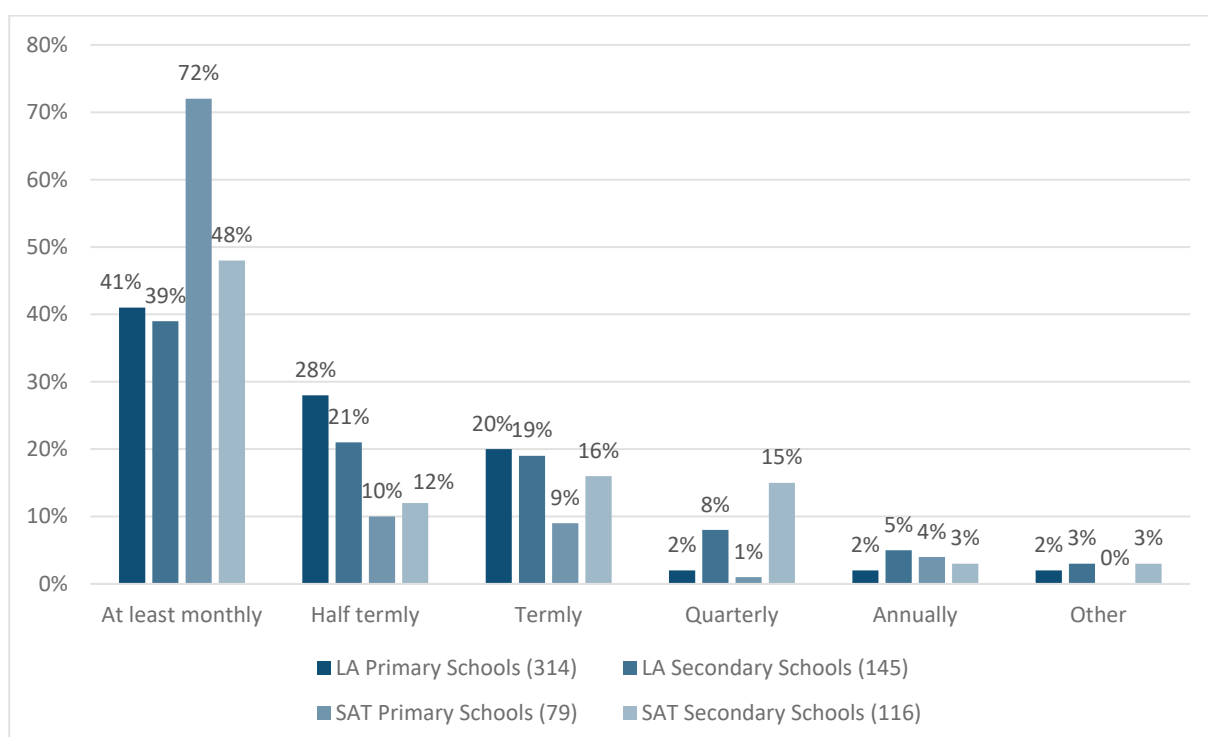
Financial planning in schools and trusts

Monitoring finances in standalone schools and trusts

55. Schools and trusts¹⁷ have significant budgets that require close monitoring to ensure that they are well managed. Respondents were asked how regularly their senior leadership team and governors reviewed finances. MATs and standalone schools were asked differently worded questions, reflecting their different arrangements. Figures 11 and 12 capture findings for standalone schools and show that the SLT of a standalone school will review its finances on a more frequent basis than the governing board.

56. Both phases of SATs are more likely to review finances monthly when compared to their LA counterparts both at SLT and governing body level.

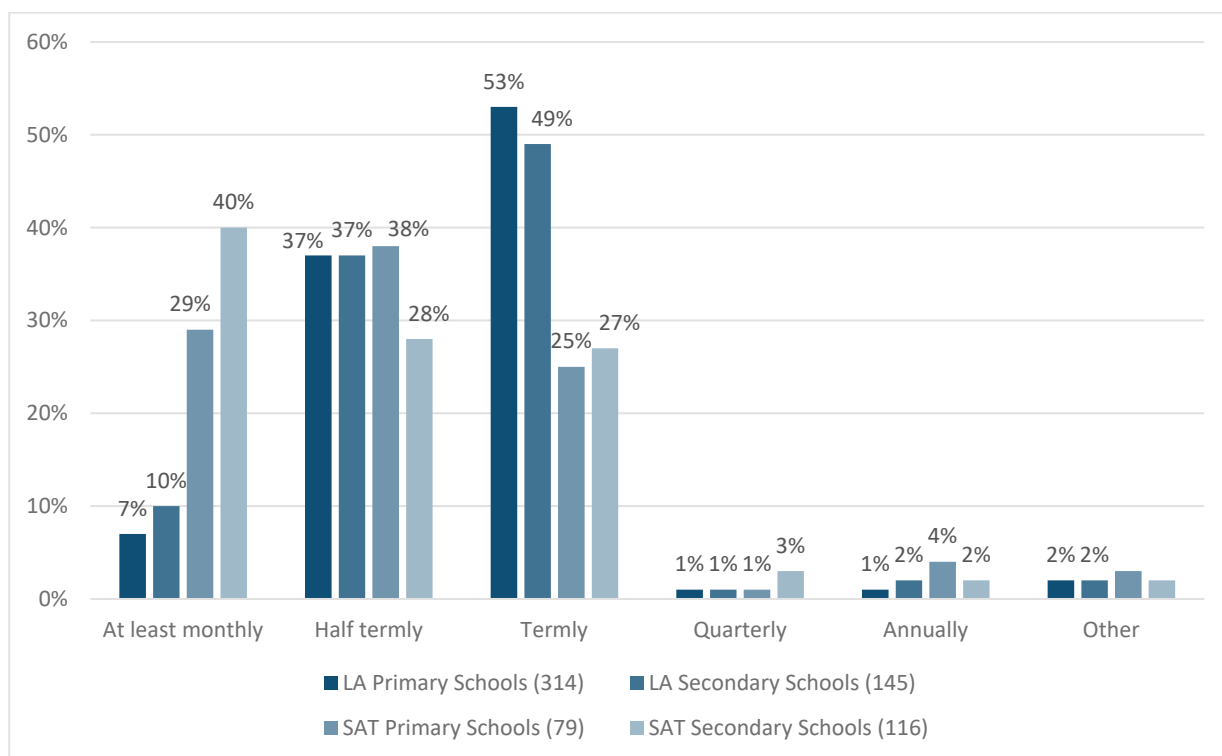
Figure 11: How often the senior leadership team reviews finances in standalone schools



Base: All standalone schools. Base sizes are shown

¹⁷ The Academies Financial Handbook requires that the monthly management accounts are sent to the chair of the trust every month and to all other trustees not less than six times a year. The latest management accounts should be presented to each finance committee meeting and (in an appropriately summarised form) to each trust meeting. As best practice, individual budget holders should also be provided with monthly income and expenditure accounts and/or transaction lists relating to their departments, for reconciliation.

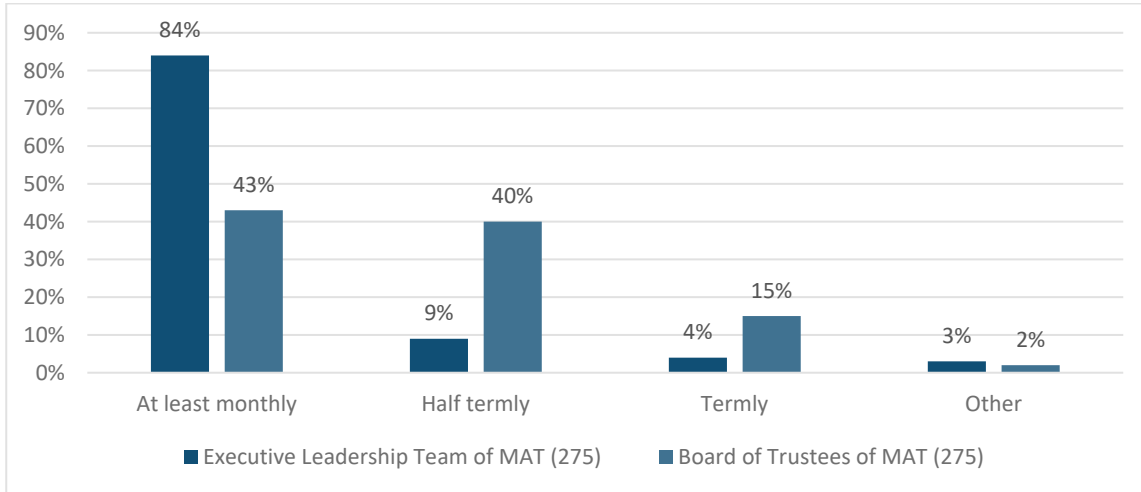
Figure 12: How often the full governing body reviews its finances in standalone schools



Base: All standalone schools. Base sizes are shown

57. In MATs, most Executive Leadership Teams review finances monthly (84% - see Figure 13 below) but review frequency does vary: 43% do so at least monthly, 40% half termly, and 15% termly. There is no significant variation in these proportions when data is examined by size or phase composition of MAT.

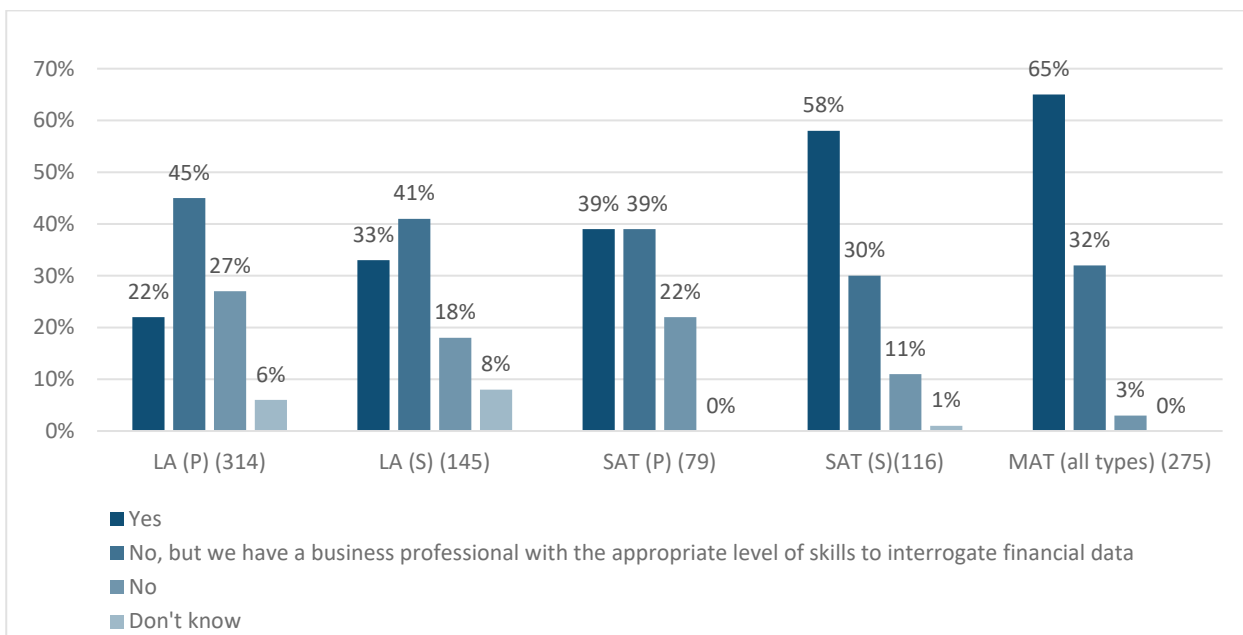
Figure 13: Frequency of financial reviews in a MAT



Base: All MAT respondents - 275

58. Figure 14 shows responses to the question: does your school have an accountant on your governing board? Both SATs and MATs are more likely to have an accountant on their governing board than LA maintained schools. A quarter of all primaries have an accountant on their board, compared to just over half of all secondary schools. Whilst LA maintained schools are less likely to have an accountant on their board than trusts, they are more likely to report having a business professional with sufficient financial skills to interrogate financial data.

Figure 14: Whether an accountant is a governing board member



Base: All MAT respondents - 275

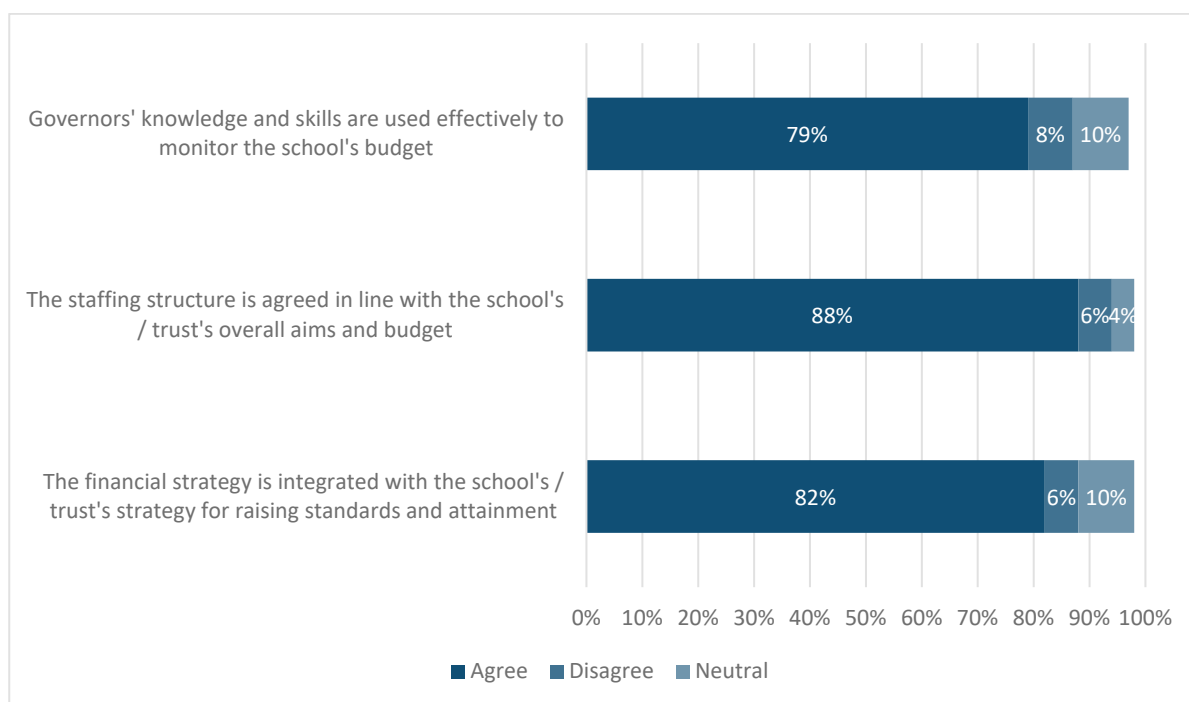
Views on financial management

59. The final set of general financial questions asked respondents for views on the application of governor knowledge and skills, links between finance and staff planning, and links between financial strategy and a school / trust's overall strategy for raising standards and attainment. As there was very little variation in responses between the different phases and type of school/trust, Figure 15 shows the overall findings.

60. Most respondents believe governors knowledge is used effectively (79%), that staffing structure is in line with school/trust's overall aims (88%), and that financial strategy is integrated with plans for raising standards (82%).

61. There is no significant variation these percentages when examined by phase of school, size of trust, or phase of trust other than financial leads in MATs are more likely to agree than LA maintained schools that the staffing structure is agreed in line with the school's / trusts overall budget (94% vs 88%).

Figure 15: Level of agreement with financial and school improvement statements



Base: All respondents - 929

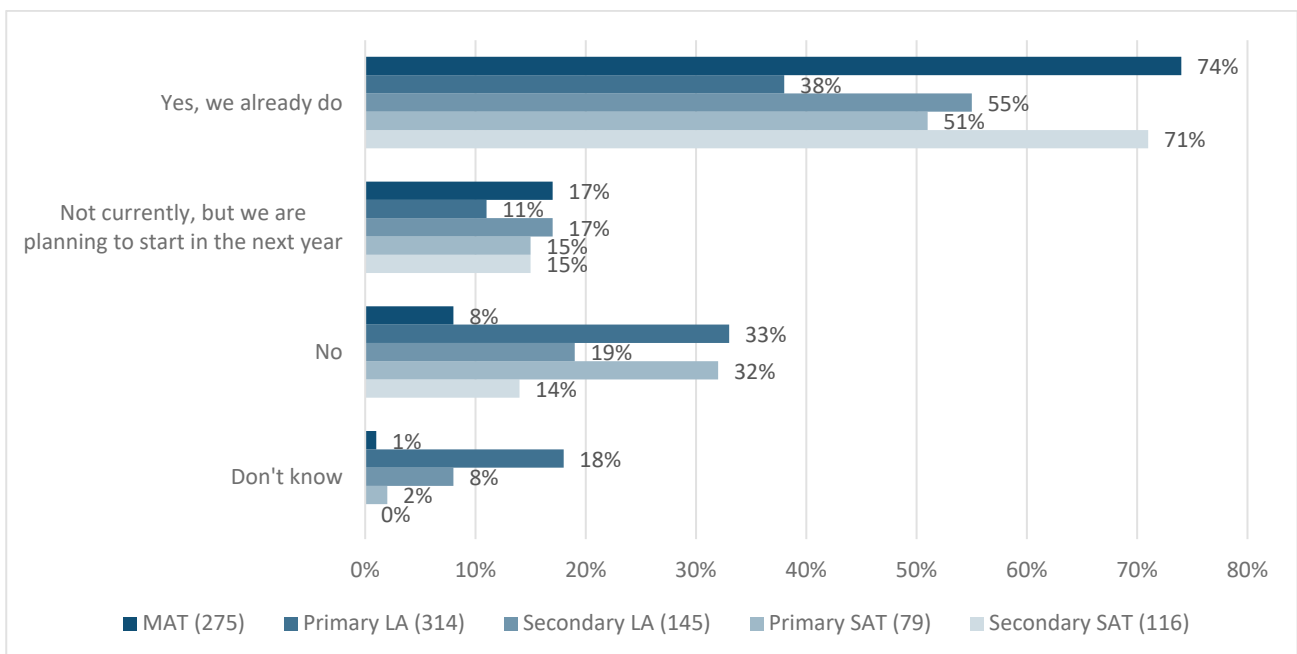
Use of Integrated Curriculum Financial Planning (ICFP)

62. Integrated Curriculum and Financial Planning (ICFP) is a management process that helps schools plan the best curriculum for their pupils with the funding they have available. It can be used at any phase or type of school. It involves measuring the current curriculum, staffing structure and finances, and using the data to create a 3-to-5-year plan. Figure 16 below shows whether LA maintained schools and trusts currently use it or intend to use it in the coming year.

63. Overall, just over half of all respondents (54%) currently use ICFP - this figure includes respondents from MATs. It is a process more likely to be in use in MATs than in both SATs and LA maintained schools. Seventy-four percent (74%) of all MATs use it with some variation by type of MAT – further analysis not shown on Figure 16 indicates more common use in ‘all secondary’ (90%) and ‘Mixed MATs’ (83%) than ‘all primary’ MATs (58%).

64. In standalone schools ICFP is more likely to be used by SATs than LA maintained schools. It is also more likely to be used by a primary SAT than a LA primary and by a secondary SAT than a LA secondary. Eleven per cent of LA primaries, 17% of LA secondaries, 15% of both SAT primaries and secondaries do not use ICFP but are planning to do so in the next year. Approximately one in three LA primaries and SAT primaries do not use it.

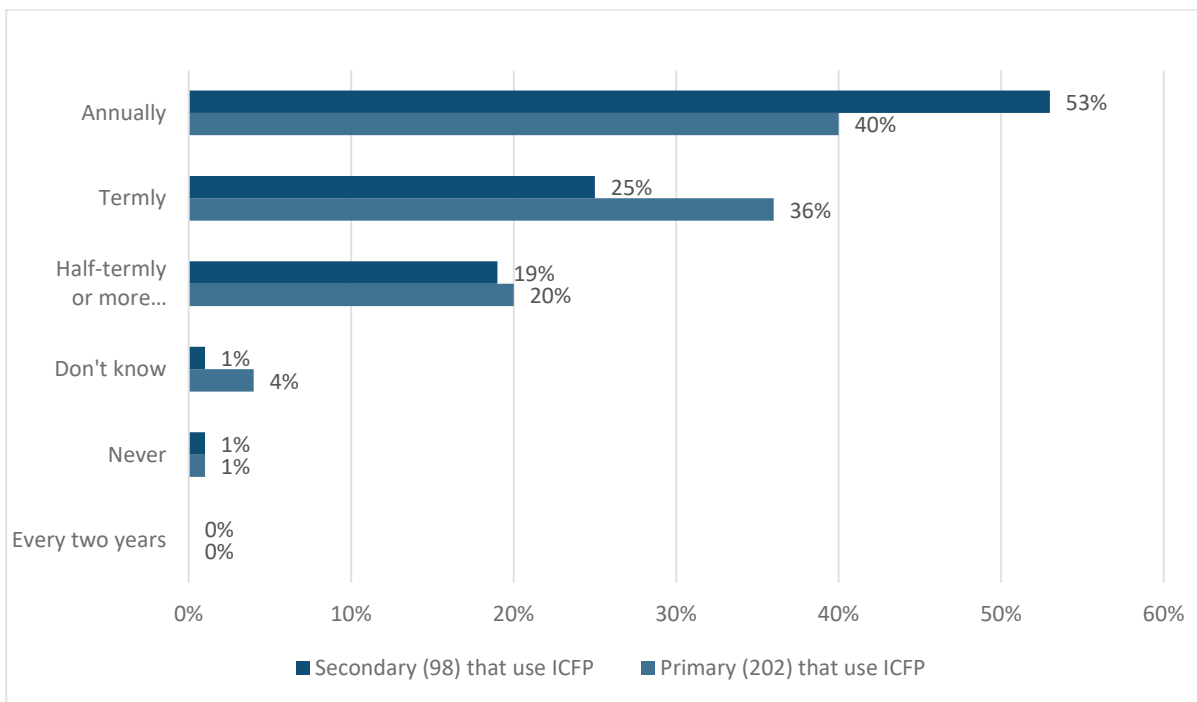
Figure 16: Use of ICFP by different school types and phases



Base: All respondents - 929

65. ICFP users were asked how frequently they review ICFP metrics - see Figure 17. For those standalone schools that do use ICFP, there is a phase of school variation in how frequently a primary or secondary school will review ICFP metrics: Secondaries are more likely to do so annually, primaries termly. Of those MATs that use ICFP¹⁸, 55% review ICFP metrics annually, 25% termly, and 17% half-termly.

Figure 17: How often ICFP metrics are reviewed in primary and secondary schools



Base: Primaries and secondaries that use ICFP. Base sizes shown.

¹⁸ Base = 204

School Resource Management (SRM) resources and recruitment

SRM tools and guidance

66. As noted at the start of this report the department has a range of direct help, tools, and resources to support school resource management. A specific webpage brings these together. These are resources for school leaders, SBPs, other school staff and governing bodies in all school and trust types, as well as local authorities. Respondents were asked whether certain SRM tools and guidance are used by their school or trust, rather than by them individually, to inform decision making. Findings are shown in Figure 18.

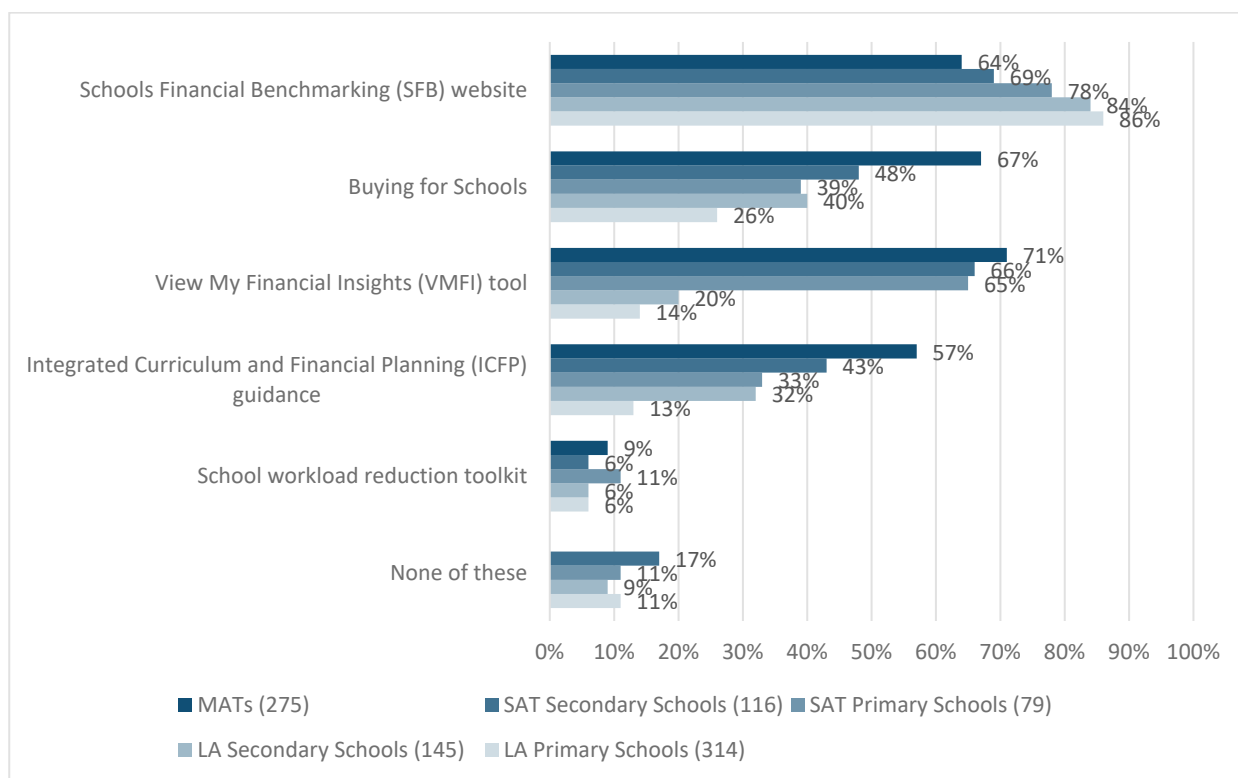
67. Trusts are more likely than LA maintained schools to use a greater number of the available tools and resources. Overall, nine in ten respondents are using at least one of the tools.

68. Of all the SRM tools available the Schools Financial Benchmarking (SFB) website is the most commonly used, from 86% of LA primaries to 64% of MATs. The school workload reduction toolkit shows least use.

69. MATs are more likely than SATs and LA maintained schools to use both Buying for Schools and ICFP guidance; the latter likely reflecting its greater application in MATs.

70. More trusts than LA maintained schools are using View My Financial Insights (VMFI). However, rollout of VMFI only began in April 2021 for LA maintained school compared to February 2020 for trusts – this reflects a planned rollout. This is the likely reason for the differences in use and application of the tool between those two groups.

Figure 18: Use of selected DfE school resource management tools and resources to support decision making



Base: All respondents - 929

Views on use and application of Schools Financial Benchmarking (SFB) website

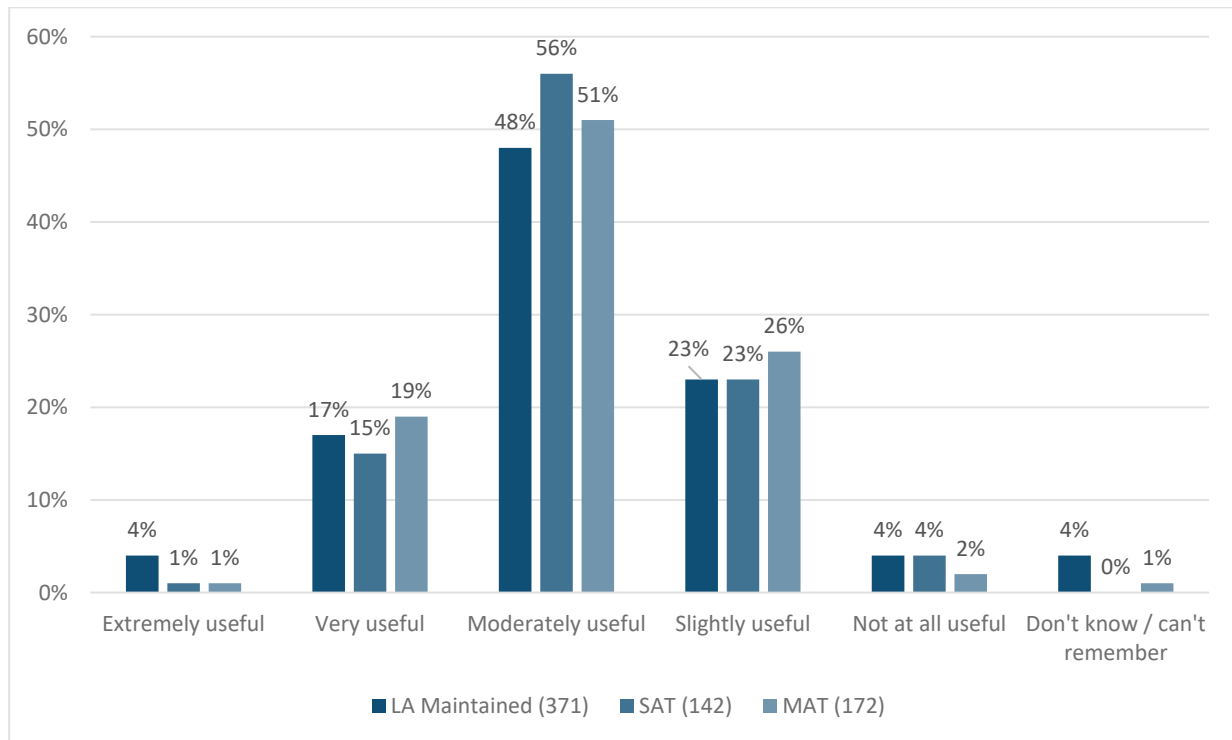
71. The School Financial Benchmarking (SFB) website is based on a series of data sets including schools' Consistent Financial Reporting (CFR) returns for LA maintained schools; academies' accounting returns (AARs); the School Workforce Census; Ofsted data, Special Educational Needs data; and contextual information from Get Information About Schools (GIAS). It shows the position of a school relative to other similar schools.

72. Respondents were asked a few questions about how often they used the site and, if they did, how they applied its findings. Results showed that financial leads are using the Schools Financial Benchmarking (SFB) website, often multiple times a year: 45% use once a year, 32% use twice a year, 15% use three to four times a year. Both SATs (19%), and MATs (22%) are more likely to use it multiple times than LA maintained schools (11%).

73. Figure 19 shows views on the usefulness of the SFB site for those respondents that have used it split by whether a SAT, MAT, or LA maintained school. The question asked about their personal experiences (not about others in the school or trust who may have used the tool).

74. Most respondents found the benchmarking site moderately useful (50%), with just under a fifth (17%) finding it very useful. Around a quarter (24%) see it as slightly useful, with 3% as not at all useful. There is little variation in perceptions of utility depending on whether the respondent was from a trust, or a LA maintained school.

Figure 19: Usefulness of the SFB website by users



Base: Those that use the Schools Financial Benchmarking (SFB) website

75. Table 5 shows how those that have used the site have applied its findings in their school or trust. A large majority of users compare themselves to other schools (86%), with just over half using in both strategic discussions at GB (58%) and identifying areas for possible efficiency (51%). Forty-two percent (42%) have used it to inform their budget setting. In MATs specifically, this figure is 51%. Lower proportions have used it to change supplier for a good or service (13%) and change their procurement strategy (9%). One in five have contacted other schools to share information or best practice.

Table 5: Actions taken following use of SFB website

Actions	Proportion of all users who have undertaken the action	Additional comments
Compared finances to other similar schools	86%	Among users there are no significant differences in this percentage by phase or type of school.
Used as part of strategic discussions at governing body meetings	58%	No significant differences in this percentage by phase or type of school.
Identified areas for possible efficiency improvements	51%	No significant differences in this percentage by phase or type of school.
Used to inform budget setting	42%	MATs are most likely to use it to inform budget setting (51% MATs).
Contacted other schools to share information or best practice	20%	Base numbers too low to have further meaningful granular analysis by type or phase.
Changed supplier of a particular good or service	13%	
Changed procurement strategy	9%	
Reviewed and aimed to change contractual terms with an incumbent	6%	

Base: Those that used benchmarking website - 712

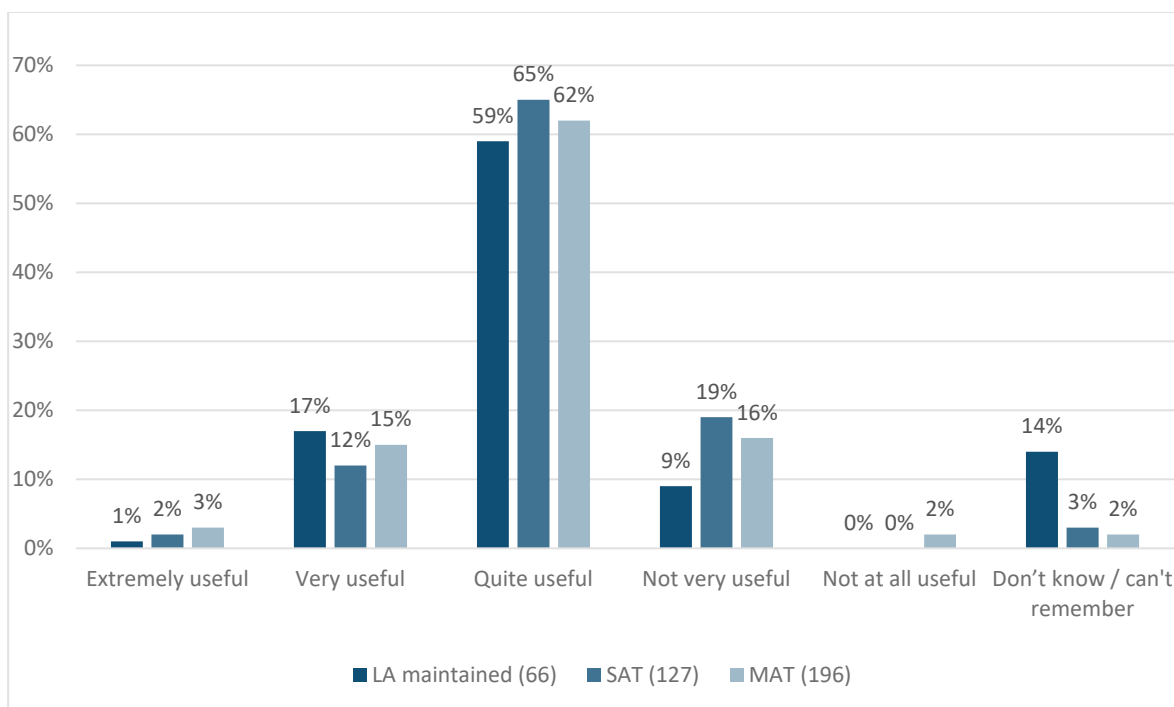
Views on use and application of View My Financial Insights (VMFI)

76. View My Financial Insights (VMFI) is an online tool which helps schools view and improve their financial performance. Through individual logins, it enables schools and trusts (as well as local authorities) with an automated assessment of their data based on similar schools. VMFI compares the financial performance of each school in an academy trust or local authority. Users see two groups of 30 schools in VMFI, one based on pupil

characteristics, one based on building characteristics. The relevant group is used depending on which cost category an individual is looking at.

77. Respondents were asked whether they had personally used the VMFI tool. Figure 20 below highlights the extent of usefulness to those who have. As noted earlier, VMFI has only been available to LA maintained schools since April 2021, and this is reflected in Figure 20 below where views on usefulness come mainly from trusts. The majority who have used VFMI had a positive view of it. Across all respondents¹⁹ 14% found it very useful and 62% quite useful, but 16% found it not very useful.

Figure 20: Usefulness of VFMI by users



Base: Those respondents that have used VMFI - 390

78. Table 6 below highlights specific actions taken by LA maintained schools and trusts after using the tool. Just under 80% of users have taken some form of applied action after using it. Overall, half (50%) who used it identified areas for possible improvement. There is some variation amongst organisational type, though - for LA maintained school, the figure is lower (34%) when compared to SATs (52%) and MATs (54%). Over a third (39%) have used findings as part of strategic discussions with SLT/SMT. Just over a fifth (22%) have not taken any action yet.

¹⁹ All respondent data not shown in Figure 20 just reported in narrative.

Table 6: Actions taken following use of VMFI

Actions	Proportion of all users who have undertaken the action
Identified areas for possible efficiency improvements	50%
Used as part of strategic discussions at GB meetings	45%
Reconsidered areas where efficiencies could be found	42%
Used as part of strategic discussions with senior leadership team (SLT/SMT)	39%
Used to inform budget setting	32%
None / not taken any action yet	22%
Used links through to the DfE commercial frameworks	15%
Contacted any other schools to share information or best practice	12%

Base: Those that have used VMFI - 390

DfE Recommended Frameworks – awareness and use

79. The department created a range of recommended frameworks to help schools and trusts obtain value for money on regular purchases of goods and services. The introduction of recommended frameworks has been a gradual process and so some frameworks have existed longer than others thus impacting the awareness and use figures that follow. Respondents were asked about eleven frameworks with Table 7 showing the extent of awareness of different frameworks by phase of school and type of school.

80. It shows that there is variation in awareness of different recommended frameworks, likely reflecting how long different ones have been available. Overall, awareness of every framework is lower in LA maintained schools compared to trusts and lower in LA primary than secondary schools. Just under one in four financial leads in LA primaries (23%) have not heard of any recommended frameworks, compared to one in nine LA secondaries.

81. Awareness of the 'Energy and Utilities' and 'Insurance / RPA' frameworks is highest. This is consistent across all types and phases of school or trust. Awareness of Personal Protective Equipment, legal, and transport frameworks is lowest.

Table 7: Respondent awareness of Recommended frameworks

Recommended FWK	LA (P) - 314	LA (S) - 145	SAT (P) - 79	SAT (S) - 116	MATs – 275
Energy and utilities	42%	59%	78%	82%	91%
Insurance / The Risk Protection Arrangement (RPA)	29%	48%	81%	86%	89%
ICT	29%	50%	49%	63%	72%
Books, stationary, and education supplies	32%	50%	52%	54%	56%
Facilities management and estates	22%	33%	44%	50%	57%
Recruitment and HR	19%	38%	42%	51%	58%
Financial (inc. audit) services	13%	26%	33%	36%	57%
Consultancy services	11%	26%	28%	35%	39%
Personal Protective Equipment (PPE) and cleaning	13%	21%	27%	33%	31%
Legal	12%	19%	22%	25%	30%
Transport	5%	14%	10%	15%	15%
None of these	23%	12%	3%	3%	1%
Do not know	17%	9%	4%	3%	1%

Base: All respondents – 929. Base sizes are shown

82. Table 8 below focuses on use of frameworks. The question asked about use by the school or trust not the respondent's individual use. Results show the extent of variability in use across school groups and types. In general, trusts are more likely to use frameworks than LA maintained schools; the Insurance / RPA framework and Energy and Utilities framework in particular. Overall²⁰, 23% of LA maintained schools, 19% of SATs and 13% of MATs are not using any frameworks.

²⁰ Not shown in the table

Table 8: Respondent use of Recommended Frameworks

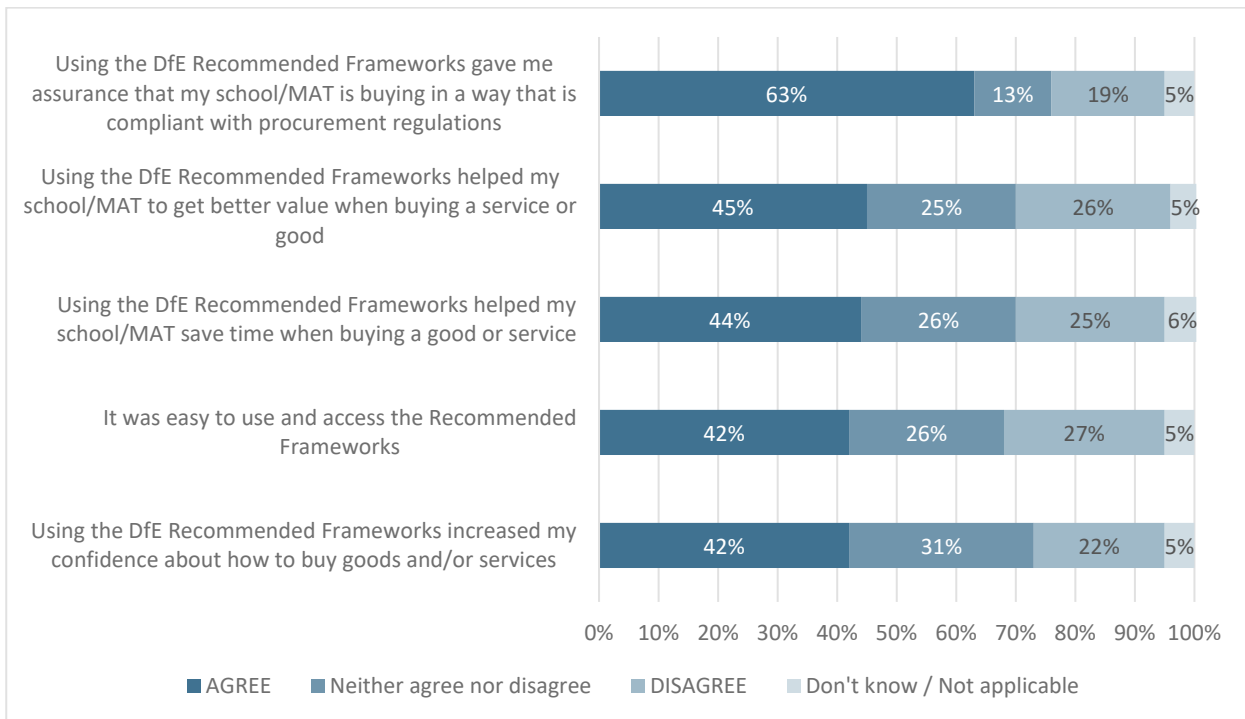
Recommended FWK	LA (P) - 314	LA (S) - 145	SAT (P) - 79	SAT (S) - 116	MATs – 275
Energy and utilities	12%	17%	29%	24%	35%
Insurance / The Risk Protection Arrangement (RPA)	9%	17%	56%	55%	64%
ICT	9%	17%	16%	24%	35%
Books, stationary, and education supplies	14%	22%	22%	16%	23%
Facilities management and estates	3%	1%	5%	6%	11%
Recruitment and HR	4%	6%	14%	9%	14%
Financial (inc. audit) services	3%	1%	5%	6%	14%
Consultancy services	1%	2%	0%	0%	6%
Personal Protective Equipment (PPE) and cleaning	5%	3%	0%	4%	5%
Legal	1%	1%	0%	0%	3%
Transport	0%	1%	0%	0%	2%
None of these	23%	28%	19%	19%	13%
Do not know	1%	4%	2%	1%	1%

Base: All respondents - 929

83. Those that were aware of them and used them were also given a series of statements about the utility of frameworks and asked whether they agreed or disagreed, shown in Figure 21 on the following page.

84. Forty-five percent (45%) of respondents who have used frameworks felt they helped them achieve better value for money when buying a good or service; 25% disagreed. Similar proportions were seen when respondents were asked whether frameworks saved them time (46% agree, 26% disagree) and whether they were easy to use and access (42% agree, 26% disagree). The disagree percentages against all statements shown highlight broad areas for improvement to the frameworks.

Figure 21: Views on recommended frameworks from those that have used them



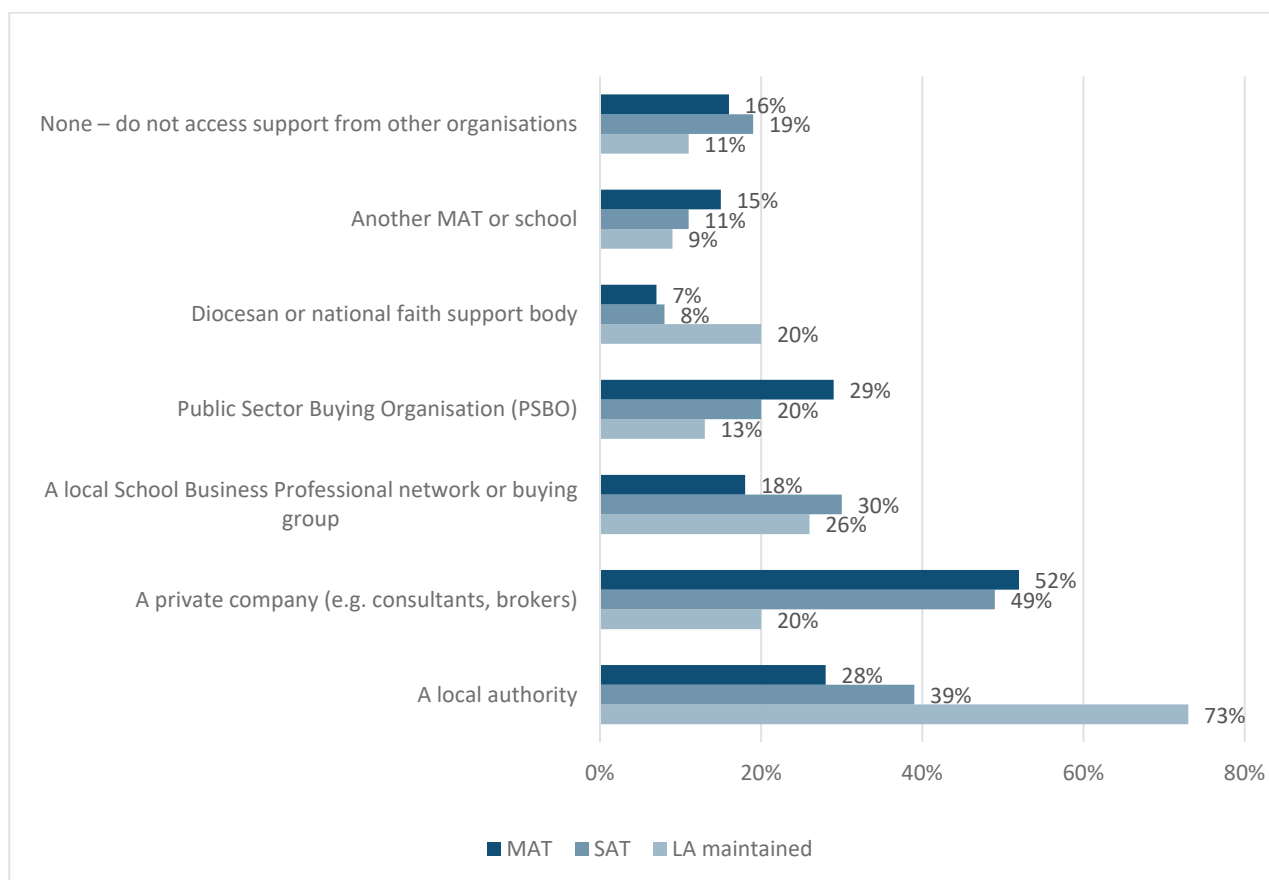
Base: Those that have used recommended frameworks – 548 respondents

Support with procurement

85. Respondents were also asked if the school or trust has accessed support from any organisations to assist with procurement of goods and services and if so from where²¹. As shown in Figure 22, trusts are more likely to use a private company or a Public Sector Buying Organisation (PSBO) than is a LA maintained school to support their procurement of goods and services – 29% MAT and 20% SAT vs. 13% LA maintained schools. Both SATs and LA maintained schools are more likely to use local authorities to assist with procurement than MATs, the latter of whom are more likely to use a range of sources. One in six MATs, one in five SATs and one in nine LA maintained schools do not access any additional support.

²¹ This question is thus asking the respondent to respond on behalf of the school or trust, not whether they themselves access additional support

Figure 22: Sources of procurement support



Base: All respondents – 929

School business professional recruitment

86. In the final set of questions, shown in Figure 23 below, respondents were asked if, to the best of their knowledge, the school or trust had struggled with recruitment of SBPs in the past two years.

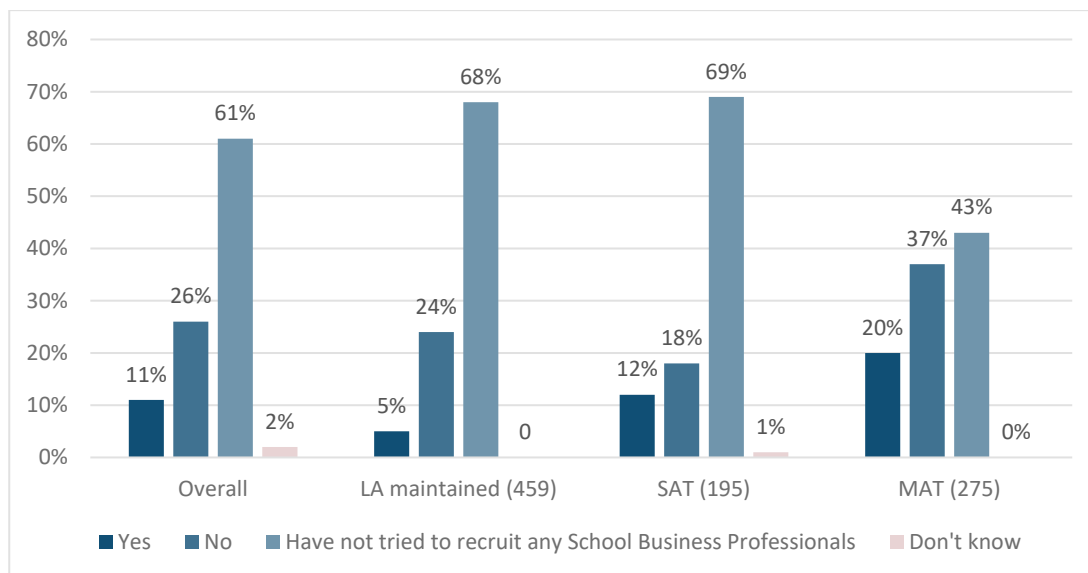
87. Just over two thirds of standalone schools (68% LA maintained schools, 69% SATs) have not tried to recruit any SBPs in the past two years. There is no phase of school variation in these figures. Of the remaining third, 26% have not struggled to recruit but 11% have. Thirty-seven percent (37%) of MATs have not struggled to recruit, but 20% have (1 in 5). Forty-three percent (43%) have not tried to recruit any.

88. Of those that have struggled to recruit, respondents were asked an open question about reasons for this. One hundred and thirteen (113) responses were received, with four themes of response emerging²². These were: (a) applicants lacked the skills

²² Percentages will not add up to 100%. They are of the 113 responses, not all 929 respondents, so should be treated with caution.

required (68%), (b) low number of applicants (66%), (c) applicants lacked the experience required (53%), and (d) unable to offer competitive or high enough salary (48%).

Figure 23: Whether the standalone school or MAT has struggled to recruit SBPs in the past two years



Base: All respondents - 929

Teaching Vacancies

89. One part of the department’s school resource management portfolio of programmes is Teaching Vacancies (TV). Introduced in 2018 it provides schools with a straightforward and free service to list vacancies and to provide jobseekers with a place to search for jobs nationwide instead of relying on expensive media advertising. The service was rolled out in phases and has been available to all publicly funded schools in England since April 2019.

90. Figure 24 shows awareness and use of this service. A survey question asked about their awareness and use of the service; it did not ask them if they knew of others in their school or trust who were aware of it and/or had used it.

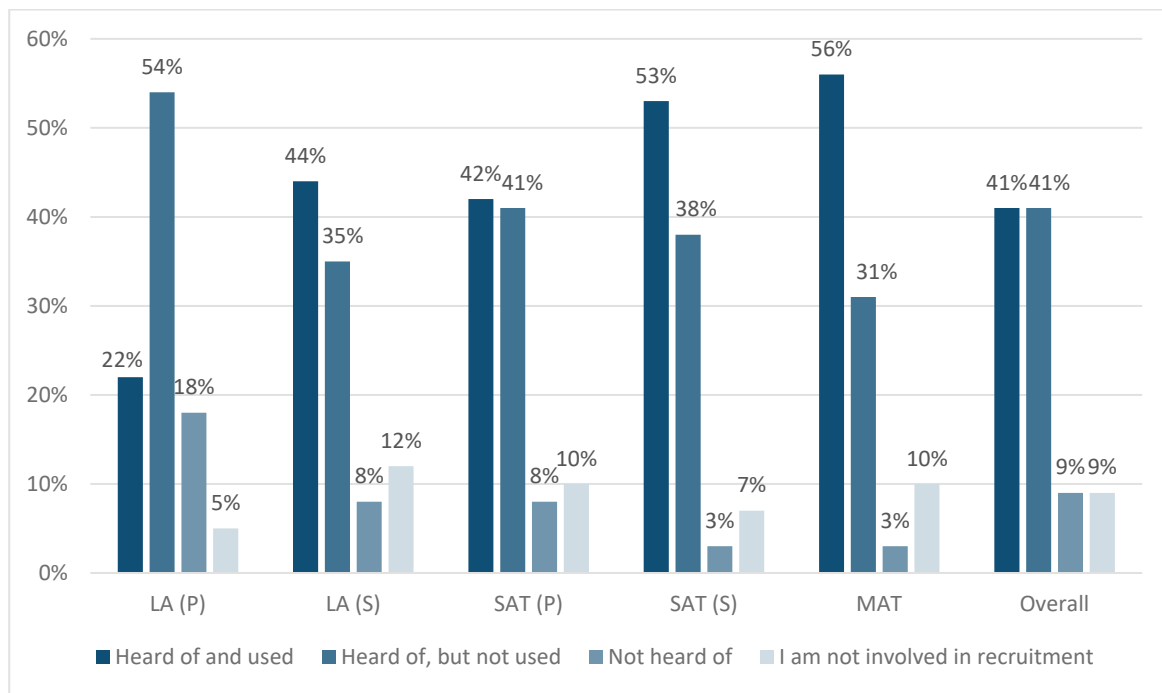
91. The figure shows that overall awareness of TV is high in all groups: 82% of all respondents have heard of it, 41% have heard of it and used it, 41% have heard of it but not used it, and 9% have not heard of it. Trusts are more likely than LA maintained schools to have heard of TV and used it: 56% of MATs and 48% of SATs have heard of and used the service compared to 29% of LA maintained schools²³. Within the 29% LA

²³ These overall SAT and LA figures are not shown on Figure 24 – they reflect the combined figures for primary and secondary SATs, and primary and secondary LA schools.

figure, and shown in Figure 24, there is a phase of school variation, with more awareness and use in LA secondaries (44%) than LA primaries (22%).

92. Thirty-one percent (31%) of MATs and 39% of SATs have heard of TV, but not used TV²⁴. For LA maintained schools the figures are 35% for secondaries and 54% for primaries respectively.

Figure 24: Awareness of DfE's Teaching Vacancies service



Source: All respondents – 929

93. Those that have heard of and used Teaching Vacancies²⁵ were asked for views to improve the service. Nearly half (45%) 'Did not know', twenty-seven percent (27%) referenced 'better advertising / increased awareness', and nine percent (9%) suggested to 'include non-teaching vacancies'²⁶.

²⁴ SAT figure is not shown on Figure 24 and reflects the combined figure of both phase of school SATs which are shown

²⁵ 353 respondents

²⁶ No other them of response got more than 2%.

Teacher vacancies

94. Respondents in standalone schools were asked, if known, how many teacher vacancies had their school/MAT advertised in the last academic year (2020/21). SBPs often lead recruitment, but the question was reliant on the respondent knowing at the point of asking, and knowledge of teacher vacancies being part of their specific role remit.

95. Secondary schools are usually larger than primaries and obviously are not all the same size. Table 9 reflects this, breaking down the mean number of vacancies by size of school (pupil numbers). As would be expected, the number of teaching vacancies rises the larger the size of the school.

Table 9: How many teaching vacancies has your school advertised in the last academic year?

Phase of school the 2020/21 year	Mean (2020/21 AY)
Primary school	1.5
Secondary school	6.8
Size of school	Mean (2020/21 AY)
<500 pupils	1.4
501-1000 pupils	3.9
1001-1500 pupils	7.7

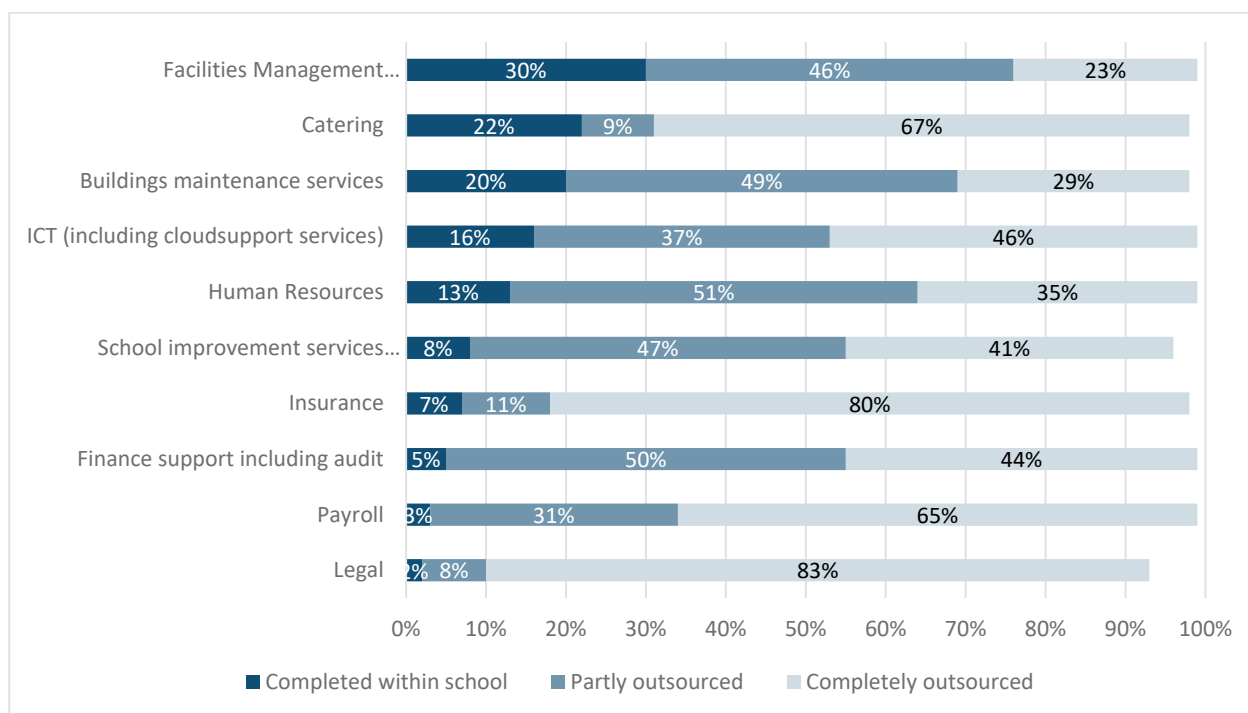
The provision of services within schools and MATs

Provision of services within standalone schools

96. Schools require a range of services and functions to operate effectively with school business professionals involved to varying degrees in the management and provision of these. They can be provided internally or be partly or completely outsourced, with schools having the autonomy to decide the most efficient way of undertaking these functions.

97. Of ten key support services and functions in a standalone school shown in Figure 25 below, Legal (83%), payroll (65%), insurance (80%), and catering (67%) are most likely to be completely outsourced. Around half of standalone schools will partly outsource the following: facilities management (46%); buildings maintenance services (49%); human resources (51%); finance support (50%); and school improvement (47%).

Figure 25: How certain functions are completed by standalone schools



Base: Responses from standalone schools - 654

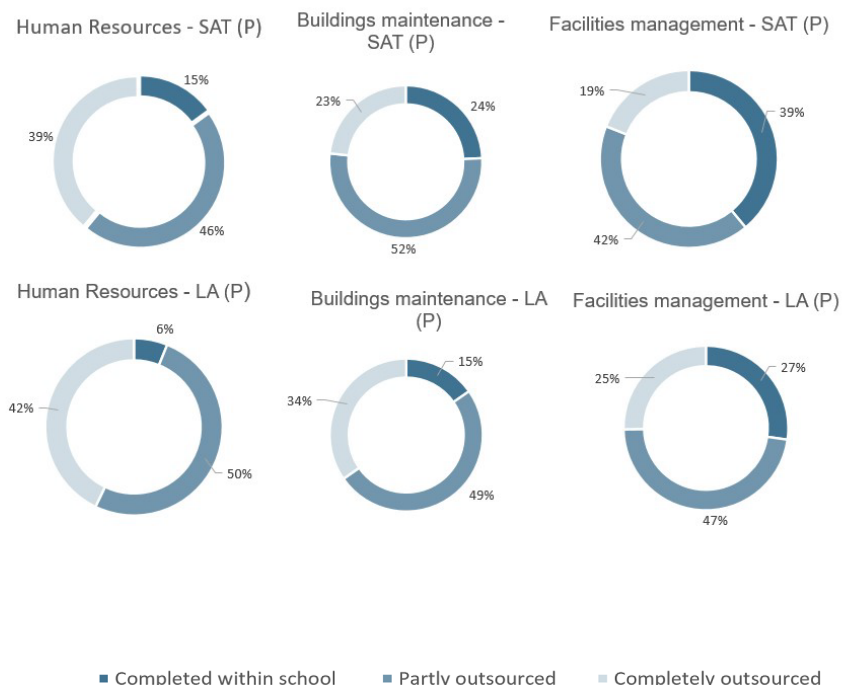
Provision of services in different types and phases of standalone schools

98. When examined by phase of school²⁷, a primary school is more likely than a secondary to completely outsource the following: human resources (42% vs. 13%); information and communications technology (ICT) (55% vs. 15%); finance support (47% vs. 33%); buildings maintenance services (33% vs. 16%), and school improvement services (45% vs. 27%).

99. Figure 26 below specifically shows differences between SAT and LA primaries. Human resources, facilities management and building maintenance services are more likely to be completed within the school by a primary SAT than a LA primary. The most pronounced difference in how services are provided between primary SATs and LA primaries is with facilities management where 39% complete within the school in a SAT primary compared to 27% in a LA primary.

100. The points made directly above do not necessarily mean that SATs are more efficient at providing these services, they simply show that SATs are more likely to have made the decision to provide these services using internal expertise and resource than LA maintained schools.

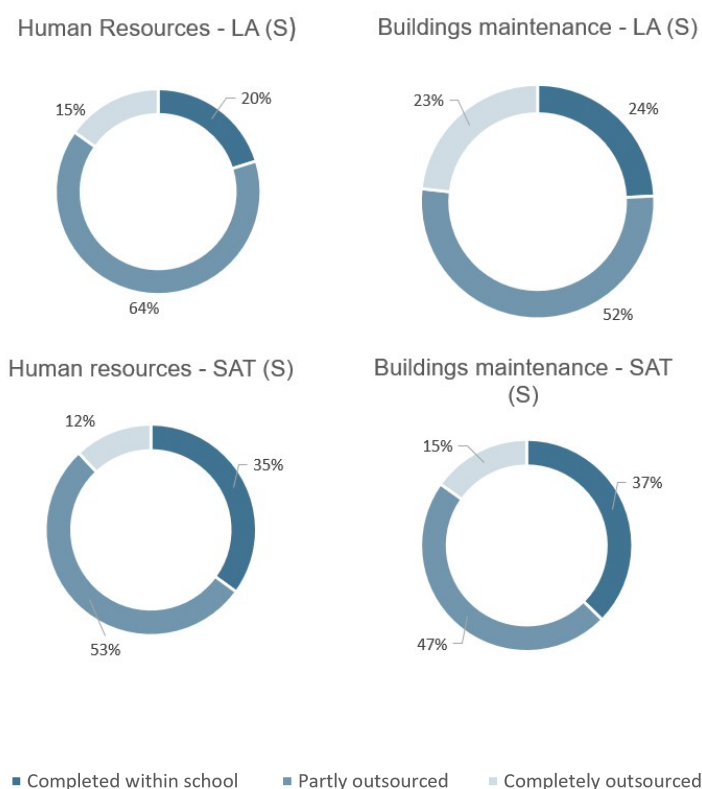
Figure 26: Services that are more likely to be completed within (rather than outsourced) primary SATs than primary LA maintained schools



²⁷ Not shown in Figure 24 or 25

101. In Secondaries, Human Resources and building maintenance are more likely to be completed within a secondary SAT compared to a LA secondary; as shown in Figure 27. For the other eight services there is no significant variation between types of secondary on whether they are completed within school, partly outsourced, or completely outsourced.

Figure 27: Services that are more likely to be completed with (rather than outsourced) secondary SATs than secondary LA maintained schools



Provision of services within MATs

102. Previous research²⁸ examined the level of “top-slice” used by MATs to provide central services and found that most MATs (75%) take a top-slice of each academy’s budget which is used to provide essential services. Figure 28 below shows how the same ten services reported in Figure 23 are provided within MATs.

103. Finance support (81%), Human Resources (66%), legal (63%), school improvement (55%), and payroll (54%) are provided centrally²⁹ through a top slice in

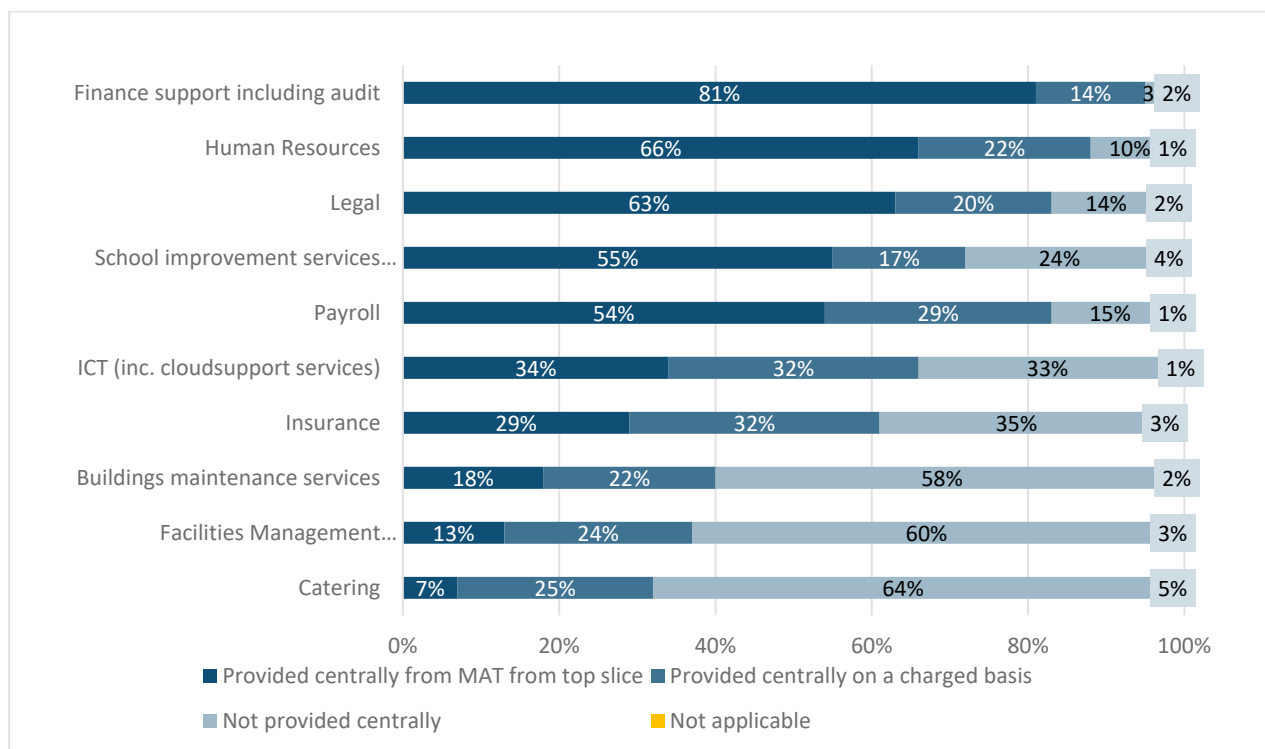
²⁸ Cirin (2017). *Academy trust survey*. Department for Education

²⁹ MATs can top-slice a percentage of income from their schools' general annual grant to fund their operational costs.

most MATs. The three areas where most MATs do not provide the service centrally are: buildings maintenance services (58%), facilities management (60%), and catering (64%).

104. Not shown in Figure 28, across all ten categories there is little variation (not significant) in response proportions between MATs when the data is examined by type of MAT, i.e., MATs of all primaries, MATs of all secondaries, or mixed MATs.

Figure 28: Provision of services within MATs



Base: All MATs - 275

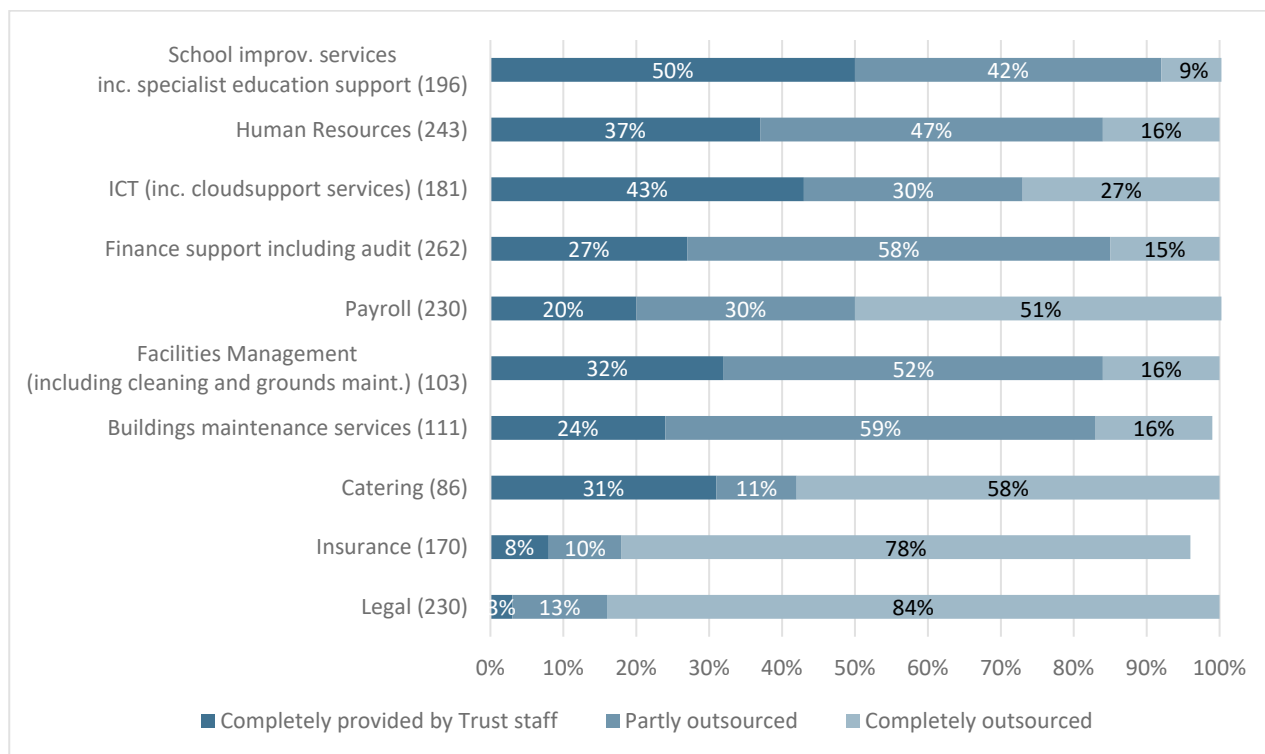
Provision of central services in MATs

105. Services provided centrally by MATs to their schools through the top-slice or on a charged basis are not always provided by MAT staff. It is likely that MATs seek the most efficient way of providing services by either using their own staff or by bulk buying across the MAT if they cannot provide the service themselves. The way in which these central services are provided can be split into three: provided by MAT staff, partial outsourcing, and complete outsourcing.

106. Respondents were asked of the functions that are provided centrally, either from top slice or on a charged basis (i.e., those shown in Figure 28 above), which are entirely provided by trust staff, and which are partly or completely outsourced? Figure 29 below shows how each service is centrally provided in each of those three categories.

107. It shows that where a function is provided centrally, school improvement services (50%) and ICT (43%) will tend to be completely provided by MAT staff. Human resources will tend to be partially outsourced (47%) by the central team as will finance support (58%), facilities management (52%) and buildings maintenance services (59%). Legal (84%), insurance (78%), catering (58%) and payroll (51%) will tend to be completely outsourced.

Figure 29: How those services provided by a MAT's central services are delivered



Base: Those MATs where functions are provided centrally. Base sizes shown above

Conclusion

108. This research has highlighted not just the characteristics of SBP (financial leads) in LA maintained schools and trusts to a greater degree than the 2019 survey, capturing intelligence on length of service and future intentions for study and training, but also their continued important role in strategic decision making as part of senior or executive leadership teams.

109. The differences in approach to resource management and financial planning shown in the numerous figures and tables is to be expected given the divergent nature of the education sector: schools are of different sizes, different phases, in different groupings, with different devolved governance arrangements, requiring different mixes of SBPs.

110. Numerous figures demonstrate these differences when considering types of schools and phase of school. For example, finance appears to have a higher profile within secondary schools than primary, and there is also a clear difference by school type within phase with academies more likely to scrutinise finances more closely and have governors with specific financial expertise – a finding consistent with the 2019 school business professional survey

111. The department will use these findings to identify specific areas where certain types of schools require extra support. We will continue to develop the data and transparency tools noted in this report to make them more accessible and allow for greater insight and offer training to ensure SBPs can get the most out of them.



Department
for Education

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Reference: RR1227

ISBN: 978-1-83870-361-5

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