



National College for
School Leadership

www.ncsl.org.uk

Inspiring leaders;
improving children's lives

PHOTO REDACTED DUE TO THIRD PARTY RIGHTS OR OTHER LEGAL ISSUES

Bursar Development Programme

Impact and Evaluation Report

April 2007

Chief Executive's foreword

This is the third Bursar Development Programme Impact and Evaluation Report. I am pleased to report that we have continued to make significant progress through our collaborative work with the Training and Development Agency for Schools, to refine and develop the programme to meet the challenges that lie ahead.

Less than six years ago, there was no structured national training programme for school business managers (SBMs). Now we have a suite of courses which, with the aid of local partnering arrangements, can be delivered flexibly at certificate and diploma level, enabling 1,700 places to be launched this year. By the end of 2006-07 there will be around 3,500 fully trained SBMs.

The College exists for one reason: to support and develop current and future school leaders. Our task is to ensure that school leaders, including SBMs, have the skills, knowledge and confidence to make a real difference to the lives of children and young people across England.

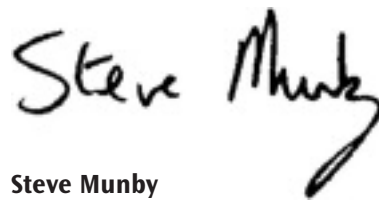
SBMs have a key role to play in schools. They can ensure the best use of resources and facilities, enabling teaching staff to find greater satisfaction through a renewed focus on teaching and learning. We know that effective leadership is a prerequisite to improved performance in schools. SBMs also have an important leadership role, in which the mastery of finance and resource management disciplines are valued as vital and important skills.

Studies show that these courses are continuing to have a positive impact on individual SBMs and their schools. Many SBMs have acquired increased confidence and effectiveness from the training. It is also clear that SBMs are supporting their headteachers and schools by taking on a broad range of management and leadership tasks.

During a series of regional conferences held by the College, I heard first-hand confirmation of the impact these courses are having and how positively both the Certificate of School Business Management (CSBM) and the Diploma of School Business Management (DSBM) have been received.

Great challenges lie ahead in terms of both the need for continued improvement in pupil standards and the expectations set out in the government's green paper, *Every Child Matters* (2003). Effective school business management lies at the heart of successful school remodelling, the reduction of bureaucracy to free teachers to teach, and the development of management discipline in both day-to-day operational and strategic decision-making. Our ambition is to help SBMs meet these challenges by providing them with the skills to think strategically, to maximise the potential of staff and resources, and to manage change effectively.

We know that excellent leadership can radically transform children's life-chances. We can help SBMs develop their careers to deliver something that is truly outstanding – for themselves, for their schools and above all for the children and young people with whom they work.



Steve Munby

*Chief Executive
National College for School Leadership*

Contents

Chief Executive's foreword	1
Executive summary	3
Senior Programme Manager's report	4
Milestones and achievements	6
Introduction	9
– Purpose of this report	9
– Aims and objectives	10
The College's contribution	13
– Certificate of School Business Management	13
– Diploma of School Business Management	15
– Other developments	17
Finance and BDP statistical information	19
Case histories	23
Project case studies summaries	30
Evaluation and impact	36
– Findings	36
– Recommendations	39
BDP impact in schools	40
Plans for the future	42
Appendices	43
– Appendix 1: Programme partners	43
– Appendix 2: Glossary	45
– Appendix 3: References	46

Executive summary

As our objective, to train 1,000 bursars by 2006, was achieved a year early in March 2005. We have focussed our work on the further development of the programme to ensure that it delivers appropriate and relevant professional skills and training to SBMs in order to increase their level of competence in key areas within their school.

This permits SBMs to fulfil a broader role within schools often taking a leadership role within the school management team, thus freeing up teachers and headteachers to concentrate more on teaching and learning.

Our evaluation studies continue to confirm that after studying the Certificate of School Business Management (CSBM) and Diploma of School Business Management (DSBM), SBMs are having a positive impact on their schools by increasing their involvement in running their schools, taking on more leadership and management orientated roles and showing improved confidence and ability to put their views and ideas across and affect the environment in a positive way.

In March 2007, the final graduation ceremony of the current series will be held. These events celebrate all the hard work of our graduates, delivery providers and key stakeholders.

Although our programmes continue to remain popular – every cohort has been oversubscribed since the programme's inception – we have introduced a local derivative of the CSBM programme to make access easier for candidates. In addition initial accreditation of prior experience and learning (APEL) arrangements have been developed to offer candidates a more flexible and personalised approach to learning.

We have also fundamentally reviewed the structure and content of the CSBM programme – a pilot of the new approach has been extremely well received.

A critical objective next year will be to fundamentally review DSBM to ensure that it provides candidates with the skills and competencies to support their head teachers and also takes into account the PricewaterhouseCoopers – Independent Study into School Leadership report's findings and recommendations.

In addition the main activities over the next 12 months will include the completion and implementation of accreditation of prior learning (APL) arrangements for both programmes.

Our approach to localisation of programmes will continue through our plans to pilot and evaluate a 'localised delivery' of the DSBM programme and we intend to finalise arrangements to enable past graduates to update their learning.

Evaluation of CSBM and DSBM programmes have been key to their success. We intend to publish both the University of Hull's three year impact study and the College's baseline study taking forward their recommendations during the forthcoming year.

Finally key partners in the USA, South Africa and Canada are interested in working with us to raise the profile of the school business management profession. We reported in our last report that colleagues in the Western Cape Education Department intended to develop a similar programme in South Africa by 2007. Plans are now well advanced and we anticipate that this programme will be rolled out during the latter part of 2007.

In addition the College's International SBM conference 'Schools in the 21st Century – the role of the School Business Manager' planned for April 2007 represents a unique opportunity to consider the future and explore how best to develop the SBM role, so that it continues to contribute effectively to the exceedingly complex education landscape of the future.

Senior Programme Manager's report

Our approach over the period of this report has been to consolidate the College's suite of school business management courses so that demand is accommodated, the quality of courses is maintained, their impact is regularly assessed and we achieve value for money in their planning and delivery.

In particular, we have aimed to:

- refine and modify the courses where evaluation evidence indicates a need
- ensure that course content remains up to date and relevant
- encourage wider participation in the programme
- raise the profile of the profession through collaboration with the Training and Development Agency for Schools (TDA)
- incorporate our independent evaluators' recommendations to further develop the programme

Our major achievements are as follows:

- The College can now deliver 1,400 CSBM places and some 300 DSBM places across England each year, with waiting lists being managed effectively.
- CSBM content delivery has been reviewed and a restructured course is being piloted. The main changes are an improved online pre-course induction, modularisation of the course and a more continuous approach to assessment.
- The College has introduced localised CSBM courses with the same structure and content as the national course but in collaboration with local stakeholders, usually local authorities, who help identify potential candidates. These have proved immensely popular.

- Evaluation results indicate high satisfaction and completion rates among candidates, a positive effect by trained SBMs on their schools and a continuing reduction in cost per training place and per completion. On average, graduates are achieving savings that exceed the cost of their courses.

I stated in previous reports that the SBM discipline has never had a higher profile and that the importance of sound business management and decision-making skills in our schools is now widely accepted. The College and the TDA have built on this foundation through attendance at conferences and the publication of articles and papers to ensure that the value of school business managers is fully appreciated.

This exposure has led to increased interest, both at home and overseas, in the College's courses. Colleagues in South Africa will pilot a CSBM course in Western Cape Province in 2007, and colleagues in the USA and Canada are exploring ways of working with us.

The profile of SBMs has been raised still further by the publication in January 2007 of an Independent Study into School Leadership by PricewaterhouseCoopers. A priority for the College in the coming year will be to review, update and possibly broaden its suite of business management courses to enable SBMs to:

- play a broader role in supporting headteachers and driving forward the vision of their schools
- acquire the skills and competence to assume devolved leadership responsibilities
- make a real contribution to the head teacher succession planning strategy by taking on more of the management and administrative workload that currently falls to headteachers

In addition, we need to address several challenges in the coming years.

- The current high profile of SBMs must be maintained to make sure they are effectively deployed and their impact in school is maximised.
- Policy initiatives such as the Financial Management Standard of the Department for Education and Skills (DfES) will continue to increase the demand for highly skilled and competent SBMs.
- Over 60 per cent of SBMs are aged 46 or over, and the programme must widen its appeal.
- Courses must be developed so that they can be personalised.
- Course design and assessment should be reviewed to encourage the present trend of rising completion rates and falling costs.

By collaborating with the TDA and continuously responding to the needs of schools and their business managers, I am confident that we will meet these challenges and in so doing ensure that SBMs have the skills and competence to fulfil their key role within our schools.



Trevor Summerson

*Senior Programme Manager
Bursar Development Programme*

Milestones and achievements

Table 1: Bursar Development Programme: milestones achieved

2005-06

April 2005	CSBM and DSBM programme review phase complete and rolled out nationally
May 2005	CSBM Cohort 5 launched
June 2005	DSBM Cohort 2 launched
July 2005	Online leadership learning portfolio pilot ends
September 2005	University of Hull produces third interim evaluation report
October 2005	Phase 2 of materials review completed
November 2005	CSBM Cohort 6 is launched
November 2005	DSBM Cohort 3 is launched
November 2005	CSBM Cohort 3 graduations held (London and Sheffield)
December 2005	University of Hull produces fourth interim report
January 2006	Launch locally/personalised pilot of CSBM programme
March 2006	Visit from Association of School Business Officials launches links with American school business management
March 2006	First joint CSBM and DSBM graduation ceremony held at NCSL

For key milestones in previous financial years please refer to the 2003/04 and 2004/05 reports, which can be found on www.ncsl.org.uk/bursar.

2006-07

May 2006	CSBM Cohort 7 is launched
June 2006	DSBM Cohort 4 is launched
July 2006	University of Hull produces interim evaluation report for the first locally delivered CSBM programme
August 2006	University of Hull produces fifth interim report
September 2006	National roll-out of a personalised delivery approach of the CSBM programme through a series of 11 locally delivered CSBM programmes launched
October 2006	Work completed on the CSBM On-line Induction module
October 2006	4th External candidate initiative workshop took place at the NCSL in Nottingham
October 2006	Plans to host the international conference confirmed
November 2006	CSBM Cohort 8 is launched
November 2006	New materials launched in 3 regions as part of phased implementation
December 2006	5th External candidate initiative workshop scheduled for March 07
January 2007	DSBM Cohort 5 is launched
February 2007	University of Hull produces final report
March 2007	Second Baseline study finalised

Milestones and achievements

Table 1: Bursar Development Programme: planned milestones

2007-08

April 2007	International conference – “Leading schools in the 21st Century”
May 2007	APL arrangements confirmed
May 2007	CSBM Cohort 9 commences
June 2007	DSBM Review
October 2007	New BDP contracts finalised
November 2007	CSBM Cohort 10 commences
November 2007	DSBM Cohort 6 commences

For Key milestones in previous financial years please refer to the 2003/04 and 2004/05 reports, which can be found on www.ncsl.org.uk/bursar.

Introduction

The Bursar Development Programme (BDP) was established in 2002 at the request of the Secretary of State for Education and Skills. The College was tasked with the responsibility for training at least 1,000 existing and new bursars by 2006, and in response developed two courses.

The Certificate of School Business Management (CSBM) was established first. The objective of this entry-level course is to equip school business managers (SBMs) with the skills, knowledge and self-confidence to play an effective role in the administrative management of their schools. Emphasis is on the operational elements of the role.

The Diploma of School Business Management (DSBM) was subsequently set up to enable school business managers to operate at a strategic level and more specifically, to function effectively as key members of the school's senior management or leadership team.

Both courses employ a blended learning approach, combining face-to-face teaching sessions with an integrated online learning component.

Purpose of this report

BDP impact and evaluation reports are published periodically by NCSL as a historical record, mapping out BDP operations and activities on the financial calendar. This report, covering the period 2005–07, aims to provide a clear and useful account of the following:

- progress on targets
- the BDP's success in reducing the administrative burden of senior leadership teams, especially headteachers
- NCSL's strategic plans for the BDP in the next financial year

For historical information on the BDP, its development and impact, please refer to the Bursar Development Programme Impact and Evaluation Reports for 2003–04 and 2004–05, available on request from bursar@ncsl.org.uk.

Note on terminology

The terms 'bursar' and 'school business manager' (SBM) tend to be used interchangeably. In recent years we have observed that the term SBM is used to describe someone responsible for playing a lead role in strategic planning and leadership in the non-teaching areas such as finance, human resource management, facilities management, office management and ICT management.

A glossary can be found at Appendix 2.

Acknowledgments

NCSL acknowledges and values the work of its partners, candidates and stakeholders. Their continued support and dedication to developing the BDP is one of the main reasons why the programme is now recognised nationally as the profession's benchmark. The BDP has also attracted international interest from governments and institutions wishing to adapt it for their own purposes.

We also gratefully acknowledge the efforts of all those who have contributed to this report.

Aims and objectives

Purpose of the Bursar Development Programme

This programme is highly regarded as a key element of the college's portfolio of programmes for school leaders. Over the last year the BDP team in collaboration with its key stakeholders has focused its efforts in two main areas, firstly continuing to refine the programmes content and delivery to ensure it's "fit for purpose", by drawing on best practice, integrating new government standards, personalising the programmes where appropriate to accommodate regional training needs of schools and school business managers.

Our second area of work has concentrated on evaluation and assessing the impact of the programmes on schools in terms of our original learning objectives, better use of human and financial resources and increased professional confidence and awareness.

Our core purpose remains unchanged, notably to provide SBMs with the training opportunities to expand their skills, knowledge and competencies, so that they play a lead role in the management and leadership of the non-teaching elements of their school. This will create a greater opportunity for teaching staff to really focus on fine-tuning curriculum delivery and personalising their approach where appropriate, so that all students can capitalise on their strengths to achieve the social, academic and economic growth required for a sustainable future.

Since the programme's inception in 2002 it continues to be highly regarded by the SBM profession nationally and internationally. We firmly believe that the programme's undoubted success is due to the quality and appropriateness of the content, the blended delivery approach and SBMs' desire to make a significant contribution to the government's overall education strategy of "transforming children's life-chances" and having a world class education system.

BDP aims and objective 2005/06

The BDP's key objectives are underpinned by the NCSL's December 2005 Remit Letter from the DfES, in which Ruth Kelly (former education secretary) reiterated that the "NCSL has a pivotal role to play in equipping our school leaders with the skills and support they need in order to achieve our ambition of having a world class education system."

Table 2: BDP objectives and progress

No.	Objective	Progress
1	Continue to offer first-class continuing professional development (CPD) training opportunities for SBMs	Achieved through delivery of CSBM and DSBM courses, and initiation of changes on the basis of evaluation findings
2	Build professional knowledge and capacity and refine competence, so that SBMs can contribute to the management and strategic operation of their schools	<p>Achieved through the continuous evaluation and refinement of course materials and the personalisation of delivery to suit the needs of individual candidates</p> <p>Schools encouraged to allow SBMs to join senior leadership team or to provide DSBM candidates with the opportunity to work at this level</p>
3	Clarify the SBM role and its potential impact on schools and school improvement	Second baseline study currently undertaken to assess how the profession has developed over the last three years
4	Develop a framework to support the profession, including development of a physical network of SBMs and a virtual network to share and refine best practice	<p>Some degree courses now available to DSBM graduates</p> <p>Framework under development in collaboration with TDA</p> <p>Plans under way for mentoring and post-programme support through an alumni policy, to be confirmed in the near future</p>
5	Acknowledge and harness the skills and experience of candidates	<p>Accreditation of prior learning (APL) option offered to both CSBM and DSBM applicants</p> <p>Graduates with extensive experience and mentoring skills encouraged to provide support to external candidates new to the profession</p>

Programme milestones

The BDP's milestones for 2005–07 are concerned with its two core programmes – the CSBM and the DSBM – and the projects that support them: programme review, evaluation and accreditation. Because we feel these courses have achieved a degree of maturity, work during this period has concentrated on consolidation, adjustment and refinement.

Programme review

The aim of programme review is to continually assess the currency of course content and its delivery to our candidates. Over the last year, the new materials have been well received.

Evaluation

The evaluation team provides a continuous picture of how content and delivery are viewed by candidates, and makes recommendations for future development. Both CSBM and DSBM are now in steady state, so the team's focus has been on assessing the impact of the training on schools and on graduates' personal and professional development. The team has also recommended some changes to the structure of CSBM and DSBM, and these have been implemented.

Accreditation

The BDP is externally accredited by the Institute of Administrative Management (IAM). CSBM and DSBM are mapped and quality assured against the national qualifications framework (NQF), through our partnership with the Institute of Administrative Management. This means the skills and knowledge gained from these courses are recognised nationally and are transferable.

Other projects

The BDP team has engaged in further projects that aim to improve the quality of the programme, making it easier to access and therefore contribute to the wider SBM profession. These projects are:

- external candidate initiative
- localised programmes
- international conference

Details of each are discussed later in this report.

The College's contribution: Certificate of School Business Management

This section provides an overview of the main developments in the Bursar Development Programme since the last Impact and Evaluation Report 2004/05.

Certificate of School Business Management

CSBM continues to be our flagship course. It delivers fit-for-purpose CPD training to SBMs because it covers the skills and competencies of the SBM role and it is relevant to the context in which SBMs work. Since its introduction in 2003, it has consistently been oversubscribed for every cohort, despite an increase in the number of places offered to 1,400 a year.

Online induction module

A key recommendation of our evaluators was the removal of general 'getting started' tasks (eg accessing online materials, navigating around the on-line talk2learn system) from initial residential sessions so that candidates had more time for core learning. In autumn 2006 we developed and piloted an online induction module which candidates completed prior to attending the first face-to-face session. The aim of the module is to prepare candidates for the course by providing them with an overview of its content, delivery methods and online tools used. Feedback to date from tutors, indicate that candidates are better prepared for their first residential session.

Refined course structure

In response to policy developments in the education sector and feedback from key stakeholders (eg course candidates and educational experts), the structure of the CSBM course has been refined, as set out in Figure 1.

We are currently piloting this updated structure in three regions, and are confident that it will improve the quality and scope of the training. Analysis of feedback from candidates and facilitators will be available by summer 2007 and will inform our decisions on the adoption of this new structure.

APL exemption

As part of the NCSL's commitment to offering personalised training, the BDP programme as of November 2007 plan to offer CSBM applicants the opportunity to apply for Accreditation of Prior Learning (APL).

This will allow applicants with previous relevant qualifications to apply for exemption from certain CSBM modules in accordance with the national qualifications framework.

Working with our accrediting partner the Institute of Administrative Managements (IAM), we are very pleased to offer this additional flexibility to our candidates. We hope this will make the programmes more accessible to current and potential SBMs.

Localised programmes

NCSL is committed to delivering high-quality, personalised courses that are readily accessible. This commitment was brought into focus by feedback from some applicants who had a strong desire to undertake the training but were unable to because of personal or geographical constraints.

In February 2005, a localised CSBM course for 12 candidates based in Chesil Bay, Dorset (south west region), was piloted. Content was identical to that of the national course, but the face-to-face sessions were held locally and were not residential. Consequently candidates could focus their group discussions on the local context. The pilot was very successful, and 90 per cent of candidates completed the course.

A further 200 places were made available in localised CSBM courses during 2006–07. To date, 12 localised courses have begun, with about 180 candidates. We anticipate that interest in such courses will continue to grow.

External candidate initiative

DfES is keen to encourage the involvement of business administration managers from outside the education sector, to enhance business acumen and transfer of best practice within schools. To facilitate this, NCSL has developed a two-day workshop to introduce such applicants to the working practices of schools, the education sector and the BDP.

These workshops have been very successful, with over 15 external candidates going on to complete the BDP courses, and many securing strategic SBM roles. These external candidate workshops will continue for the foreseeable future, forming an integral part of the application process for BDP candidates from outside the education sector.

NCSL and its partners have also established a website (www.bursarjobs.co.uk), which identifies SBM and bursar job vacancies nationwide. This has become a useful and popular website among existing and potential SBMs.

Figure 1: Refined CSBM programme structure, piloted November 2006



Diploma of School Business Management

Table 3: Original and refined entry criteria for DSBM

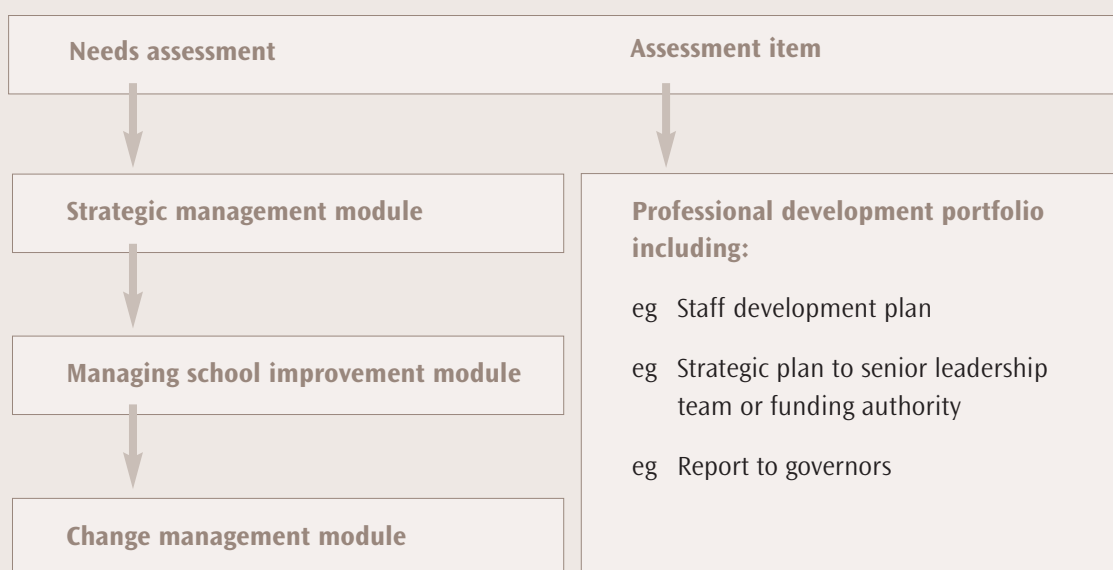
Since its national roll-out in 2004, the DSBM course has grown in popularity and credibility. It is now in heavy demand, with the last two cohorts oversubscribed despite an increase in the number of places offered to 300 a year.

The aim of DSBM remains unchanged – to equip graduates with the skills, knowledge and self confidence to operate at a strategic level within their school and in particular to operate effectively as a key member of the senior leadership team.

The course structure has remained unchanged (see figure 2), since the impact and evaluation report for 2004/05, aside from minor updates to content in response to revisions to education policy and academic thinking. External evaluation has not indicated a need for fundamental changes in content or structure, and developments have focused on refining processes such as entry criteria (see table 3). A fundamental review of DSBM is planned for 2007–08.

Original criteria	Refined criteria	Progress
Applicant could be a member of, the senior management or leadership team or work closely with it.	All applicants are either required to be a member of the SMT or play a full role in the senior management team.	External evaluation has shown that only candidates who are part of a senior management or leadership team or who play a similar strategic role in their schools are in a position to make full use of the know-how and expertise gained from DSBM.
CSBM graduates could proceed immediately to DSBM.	CSBM graduates must practise for six months before applying for DSBM.	This enforced gap enables graduates to embed their newly learnt skills and principles in their working environment. It also allows time for those not already working at senior leadership level to progress. The DSBM is more strategic in nature than CSBM and requires candidates to reflect and expand on their abilities in non-teaching aspects of their school and on their professional direction.
Non-CSBM graduates could make a request for acceptance onto the DSBM via APEL only.	Applicants can seek acceptance on the basis of either APL or APEL.	APL and APEL widen participation in the BDP and give candidates with extensive experience an opportunity to formalise this experience in a recognised qualification, thus contributing to their own continuous professional development.

Figure 2: Existing DSBM programme structure



Other developments

Accreditation of the BDP by the IAM

External accreditation of the BDP by the Institute of Administrative Management (IAM) means that CSBM graduates also receive the IAM Diploma in Administrative Management, and DSBM graduates are awarded the IAM Advanced Diploma. For further information about the IAM, see Appendix 1.

Graduation ceremonies

The BDP graduation ceremonies are a popular and informative element of the programme for graduates, their families and our key stakeholders. Over 900 candidates graduated during 2005-07. The aims of these ceremonies are many, but notably they:

- celebrate graduates' personal and academic achievements
- honour the commitment and hard work of our partners and stakeholders
- reaffirm the relationship between graduates and NCSL
- focus graduates' attention on future learning opportunities
- emphasise the importance of the SBM in the government's objective of improving the life chances of children nationwide

Ceremonies are held at NCSL's award-winning Learning and Conference Centre (LCC) in Nottingham. Feedback from graduates and guests on the content and relevance of the graduation ceremonies has been very positive.

Organisations such as the TDA, Hays Education, the Association of School and College Leaders (ASCL), Sodexo Education, Manchester Metropolitan University (MMU), IAM and NCSL exhibit at graduation events, offering a wealth of information on the services available to schools and on opportunities for further training. This additional element is set to expand as we formalise our links with graduates to ensure that they are kept abreast of academic and professional opportunities.

Figure 3: NCSL graduation 2006

PHOTO REDACTED DUE TO THIRD PARTY RIGHTS OR OTHER LEGAL ISSUES

International conference

NCSL, in collaboration with TDA, will host an international conference entitled *Leading Schools into the 21st Century: The Role of the School Business Manager*, in April 2007 at the LCC in Nottingham.

The event is supported by key national and international partners, including our delivery providers, Barclays Bank, the USA-based Association of School Business Officials (ASBO) and the Western Cape Education Department (WCED).

The conference aims to:

- discuss how to build upon the successes of CSBM and DSBM courses to meet the challenges that lie ahead for schools
- examine the recommendations of the PricewaterhouseCoopers report (PWC, 2007) and identify ways in which the SBM profession can contribute to their implementation
- explore how SBMs can help to drive forward the sustainability agenda, making schools safer for our children through recruitment training and playing an integral part in succession planning
- share and celebrate good practice and professional know-how

This is a unique event, and is likely to be lively and productive. We anticipate that the blend of keynote speakers, focused workshops, question-and-answer sessions and exhibition stalls will generate challenging discussions and innovative solutions for school leaders of the 21st century.

Programme review

One of the successes of the CSBM and DSBM courses has been their appropriateness to the changing political and social environment in which SBMs operate.

The main aim of the programme review is to continually assess the currency of both the programme's content and delivery.

In 2006, the BDP team, alongside its key stakeholders, has focused on two main areas, the refinement of course content, and assessment of the effect BDP is having on schools and on CSBM and DSBM graduates themselves.

Course review

The course review has undertaken the task of refining course content and delivery to ensure that it is fit for purpose, drawing on best practice, integrating new government standards and localising or personalising courses where appropriate to accommodate the regional requirements of schools and SBMs.

Both courses are being reviewed by MMU, independently of their course delivery function. The review examines what candidates think about course content and delivery, and makes recommendations for future development. We see this process as essential to the continuing credibility and success of BDP.

The review has focused on:

- the structure of CSBM and DSBM, to ensure that they meet the current needs of the profession
- course content, to ensure it is in line with current legislation and best practice
- candidates' views of course materials and taking appropriate action

The main tasks relating to course review that were completed during 2005–07 are:

- pilot and subsequent introduction of an online CSBM induction module
- pilot of the refined CSBM structure
- update of DSBM materials (to be introduced in November 2007)

Finance and BDP statistical information

Funding for the programme derives from the DfES via the TDA to the NCSL. Neither candidates nor their schools pay for the training programme.

Since the programme's inception the demand for places has far outstripped availability. DfES has responded positively to this demand, by increasing the amount of funding available so that additional places could be offered to candidates. The external evaluation of the programme undertaken by the University of Hull indicates this continuing oversubscription is due to the programmes' quality, value and relevance to SBMs.

Manchester Metropolitan University and Serco Education and Children's Services (Serco) continue to be the two regional providers for CSBM on behalf of the College, while DSBM is delivered by MMU, Serco and the University of Lincoln. See table below for a breakdown.

CSBM delivery Providers		Government delivery region	
Serco Learning		South West, South East and Yorkshire and Humber	
Manchester Metropolitan University (MMU)		London, West Midlands, East Midlands, North West, North East and Eastern	
DSBM delivery Providers		Government delivery region	
Serco Learning		South West	
The University of Lincoln (IIEL)		Eastern, South East and Yorkshire and Humber	
Manchester Metropolitan University (MMU)		London, West Midlands, East Midlands, North West and North East	

Table 4: Throughput for CSBM and DSBM applications and completions

Cohort	Number of places offered by NCSL	Programme start date	Completion in 2005–07	Waiting list
CSBM				
Brought forward	1700		1314	
CSBM 4	600	10/04	524	399
CSBM 5	600	04/05	438	601
CSBM 6	600	11/05	457	438
CSBM 6a	180	02/06	162	358
CSBM 7	600	05/06	53	191
CSBM 8	600	10/06	0	132
DSBM				
Brought forward	280		221	
DSBM 2	200	06/05	173	120
DSBM 3	150	11/05	135	183
DSBM 4	199	06/06	0	49
DSBM 5	121	01/07	0	38
Budget information				
2005/06 – £4.942 million				
2006/07 – £5.150 million				
2007/08 – £5.95 million				

Actual figures at time of publication

Table 5: CSBM and DSBM candidate diversity in percentages (%)

The SBM profession is characterised by a high percentage of females occupying this role. Although we have noticed that there is a slight increase in numbers of male applicants on the DSBM than on earlier CSBM cohorts. There is also a higher percentage of secondary SBMs on the DSBM than on the CSBM.

The percentage of candidates from an ethnic minority background undertaking the programmes remain low. The reason for this is currently unknown, however we are researching this aspect of diversity.

The following provides data relating to gender, ethnicity, disability and school phase.

Cohort	Gender		Ethnic background			
	Male	Female	Asian	Black	White	Unknown
CSBM 4	5	95	5	1	95	3
CSBM 5	8	92	8	2	95	2
CSBM 6	4	96	4	1	95	2
CSBM 6a	5	95	5	2	96	1
CSBM 7	6	94	6	1	96	2
DSBM 1	11	89	11	1	96	2
DSBM 2	11	89	11	2	95	1
DSBM 3	9	91	9	1	98	0
DSBM 4	7	93	7	0	98	1

	Ability or disability			School phase				
	Able	Disabled	Unknown	Primary	Middle	Secondary	Unknown	
	99	1	0	99	3	18	13	
	99	1	0	99	3	25	8	
	99	1	0	99	2	14	13	
	100	0	0	100	3	19	1	
	99	1	0	99	1	33	11	
	97	3	0	97	2	31	11	
	98	1	1	98	1	29	14	
	99	1	0	99	3	38	8	
	99	1	0	99	2	25	15	

Case histories

The following case histories provide a snapshot of how the BDP has affected a particular aspect of school life and illustrate candidates' professional development successes.

PHOTO REDACTED DUE TO THIRD PARTY RIGHTS OR OTHER LEGAL ISSUES

PHOTO REDACTED DUE TO THIRD PARTY RIGHTS OR OTHER LEGAL ISSUES



Case histories

Hilary Morrison
CSBM graduate

Hilary Morrison was a peripatetic bursar working with five primary schools in Wigan, in the north west, when she undertook the CSBM course. She has since completed DSBM and is now a business manager and leadership team member in a large primary school.

“Peripatetic bursars (‘perrys’) are increasingly in demand as older admin officers in schools retire. Traditionally, it was a purely financial role but that has changed in recent years, so I was keen to broaden my range of skills. I did have the option of doing an Association of Accounting Technicians (AAT) qualification but as I intend to carry on working in schools, the CSBM offered the best route. It provides comprehensive training that is specific to the school sector. It teaches you a lot about the wider education context and how the bursar role contributes to the bigger picture.

“My confidence in my own skills and knowledge has grown as a result of doing CSBM and DSBM but my understanding of the role’s potential has also expanded. I’ve learnt, for example, about ICT and its application to learning in the classroom, rather than only in school management.

“I thought I was fully competent but found I wasn’t in all areas. After completing the CSBM I revisited and completed the learning templates in some of the CSBM modules, just as a learning aid to keep building on my knowledge.

“You have access to a variety of resources as part of the programme, such as talk2learn, a range of websites and the course materials. I frequently find myself referring to them.”

“Talk2learn is invaluable when you are tackling a new area of work, such as extended services and children’s centre working.

“Other schools have piloted in these areas and you can gain valuable experience through discussion with your colleagues.

“You also build up networks and contacts with SBMs nationwide.

“I have shared policies and job specifications with bursars across the country and it gives me a broader and more accurate view of national strategy and how it is interpreted by different local authorities. It’s easy to become blinkered about the way you work if working in isolation.

“I suspect SBMs have a bigger impact in a primary school because it releases the leadership team to focus on learning and leading the school. Once the head trusts your reporting abilities and your understanding of the legal implications of finance, HR and similar matters, they let you shoulder more of the burden.

“Having the CSBM and DSBM qualifications as a peripatetic bursar also sends out an important message to schools that the support service they are buying is of a recognised standard. More and more, schools in this area are requesting perrys who have financial and wider administrative know-how.”

Barbara Mason
CSBM graduate

Barbara Mason is an SBM in a new primary school in Yorkshire and the Humber.

"I started at Strawberry Fields Primary School in Leeds as a part-time secretary 15 years ago, but since then my role and responsibilities have expanded considerably.

"It was my temporary head at the time who suggested I do the CSBM. I had already completed the AAT but then it was announced that our school and another on the same site were to amalgamate. Having the CSBM would, she thought, enable me to increase my knowledge and qualifications at a time when all staff had to reapply for their jobs as part of the amalgamation.

"I enjoyed the programme a great deal. The tutor and fellow candidates made me feel comfortable, which gave a real boost to my confidence.

"Some modules were very challenging but I really liked the opportunity to think about where I fitted in terms of the bigger picture."

"Discussions I had with the head had already highlighted just what a pivotal role the position of business manager can be within the school environment and this was underlined when I filled out the self-assessment documents for CSBM. They pinpointed areas where the head thought my role had the potential to have a much greater impact across the school, in particular in co-ordinating links with parents, pupils, the PTA, governors, health and social services and other stakeholders.

"I did my case study on 'Implementation of an electronic system for human resource and payroll reporting'. It might sound onerous but I enjoyed it because it gave me the chance to reflect on how what I was learning could be applied back in school. Plus I thought the blended learning approach worked well and complemented the other elements of the programme. I didn't grow up with computers but, once I knew my way around it, I found talk2learn easy to use and really informative.

"The school amalgamation went ahead while I was doing the course. It meant a new school building, a completely new staffing structure, reapplying for one's post and some redundancies.

"It was certainly a tense and emotional time for everyone.

"For the interview for the bursar's role, I drew on the course materials and discussion sessions from the course. For example, I was asked a question and I knew I could talk about financial planning linked to the school development plan as that had been highlighted on the course. I was extremely nervous beforehand but having that knowledge at hand was reassuring. And it must have helped because I got the job. I now line manage 10 support and site staff and I'm really pleased with the role. I feel incredibly fortunate to have got on to my current grade in a small school.

"Looking back, the whole experience of the amalgamation, combined with doing CSBM, was very good for my personal and professional development, and it's spurred me on to further learning. I went on to graduate from the DSBM and I am currently doing the BA (Hons) in School Business Management at Manchester Metropolitan University".

Case histories continued

Angela Warburton
CSBM graduate

“I began as a senior clerk at Billingham Campus School in Billingham five years ago. Having completed CSBM, I was promoted to school manager with new management and leadership responsibilities and an increased salary.

“One of my main areas of responsibility is the management and supervision of all support staff. I am also responsible for managing staff attendance and leave, overseeing support staff career development including the implementation of an appraisal scheme and reviewing training requirements and assessing and evaluating service delivery. It is a role I am still developing but I feel that I am becoming more effective and competent at managing the HR element of my role.

“The course tackled many issues that I deal with every day at school and gave me new ideas on how to approach them. For example I totally revamped the school’s premises register using the materials provided in the facilities management module. Analytical tools such as the SWOT analysis and PESTLE (see Appendix 2 for Glossary) were extremely useful management tools.

“The interaction with fellow candidates on the programme was really useful. The requirement to have group discussions, take part in role plays and present findings to colleagues all helped to develop my negotiation skills, understand my learning style and become a more effective communicator. Talk2learn acted as a great sounding board and network for sharing ideas, policies and procedures with colleagues nationwide.

“In my capacity as senior clerk and administrator, I mainly worked on my own initiative at an operational level.

“As the school manager, I have a more strategic role and my relationship with the senior management team has changed, in that we work more collaboratively with each other”.

“The headteacher has given me increased managerial responsibility covering areas of administration, finance, premises, ICT and HR. I feel I can support him better than before, due to increased knowledge and

understanding of the structures and processes expected within school. He is happy for me to lead on issues where appropriate and disseminate information accordingly.

“Most recently, I’ve been involved in the school’s bid to develop a specialised PE block and refurbished technology block. The development will be open to the community and managed by the school as part of an extended school role. I managed the planning for the refurbishment plus the reception, and this presented various challenges, including employing three new staff members and tackling problems such as the nightmare that is networks, computers and cabling.

“It has been a big challenge but I have enjoyed the problem-solving and the planning, and dealing with contractors has been good experience for me. These are abilities I didn’t know I had but CSBM helped to bring them out in me.

“With my head’s continued support I enrolled on DSBM in 2006. The course has developed my knowledge and understanding in strategic management, school improvement and change management. I am now a member of the senior management team.”

Heather Measom
CSBM graduate

Heather Measom is an SBM for a federation of primary schools in Yorkshire and the Humber.

"I was a school secretary when I began the CSBM and now I am a business manager in a federation of Middleton-on-the-Wolds and Beswick and Watton primary schools in Driffield in the East Riding of Yorkshire. I have also successfully undertaken DSBM and I am now embarking on a degree in School Business Management at MMU.

"Undertaking CSBM has enabled me to take over many of the day-to-day responsibilities of the management of the school, including facilities, catering and HR, and to become a line manager to all support staff including teaching assistants. I think it would be useful for every school to have a member of staff who has done CSBM, even where the management team is very strong. I thought the programme was superb.

"Whereas CSBM is about the day-to-day running, DSBM is a lot more management and about the future of the schools. It was more challenging but, again, a first-rate course."

"The knowledge that I gained from both meant I could go back to my headteacher at the time and say: 'I can do that' and offer to take on some of her workload with confidence. I now work in a federation of two primary schools. They are led by one headteacher and I am the business manager for both.

"For the federation to work effectively, I think it's essential for the head to have a business manager. There is so much to deal with in the running of the schools that it seems entirely logical to have a member of staff in place who can relieve the head of some of that burden and allow them to focus on education."

"In many ways, I believe it is smaller schools that need a business manager more, simply because they have fewer staff to share the work.

"There are obvious economies of scale in a federation – the head's salary and mine are shared between the two schools, for example. But it also means we can think creatively about how money can be best spent across both schools. With a federation led by one head and a shared business manager we can afford to have a teacher for Years 3, 4, 5 and 6 and that has definitely made a difference to the educational standards and the children's achievement.

"From the headteacher's standpoint, having Heather follow the Bursar Development Programme has brought tremendous benefits. Not only has Heather been able to take over some of the head's administrative workload, liberating her to focus on teaching and learning matters, but the knowledge Heather acquired on the programme means she brings a new insight to whole-school issues as well as management ones."

Case histories continued

Christine Bennison, Heather's headteacher, comments:

"I soon realised that the business manager was able to discuss current agendas that an admin officer may not have a working knowledge of. This depth of knowledge in business issues enabled me to change the management structure.

"There were also aspects of management that it seemed natural to delegate to Heather. For example, the teaching assistants can raise things with her that they might feel reluctant to bring to me until the issue had become a big one. If they can talk to the business manager about a problem as soon as it comes up it means we actually deal with things on the ground.

"Being able to hand over things like this has given me more time to focus on education."

"I couldn't have taken on the workload involved in running a federation unless I knew I had someone like my business manager here.

"One of the recommendations I shall certainly be making to the local authority is that when you do federate, you do it with a business manager's role as part of the package."

Project case studies summaries

These case studies offer examples of projects submitted by CSBM and DSBM graduates as part of their final assessment portfolio. These summaries will give the reader an idea of the types of issues candidates address as part of the courses.

PHOTO REDACTED DUE TO THIRD PARTY RIGHTS OR OTHER LEGAL ISSUES

Elizabeth Overvoorde
CSBM graduate

Project: Creating an environmental area and outdoor classroom for teaching and learning

School background

Robert Miles Junior School has an unused area of school grounds that is surrounded by mature trees and shrubs and is rich in wildlife. It is a resource that can be developed to provide excellent opportunities for teaching and learning.

Project importance

An objective in the school improvement plan is to 'ensure full use is made of the entire school grounds' and to 'formulate a clear plan of the possibilities available to increase the use of the school grounds'. This case study used existing resources to bring the national curriculum to life in an outdoor environment and fulfils one of the school aims 'to give children the spirit of enquiry and a sense of wonderment for all that they find in the world around them'. This project will have a considerable impact on teaching and learning and will have the potential to cover most of the national curriculum subjects, particularly science.

Project implementation

The candidate worked with internal and external stakeholders and conducted research to ensure decision making was well informed. Project plans were communicated to the school community through the school newsletter and organised working parties of parents and children. The newsletter and the school website were used to keep everyone informed of progress. Refer to SWOT analysis on next page.

What was achieved

The candidate gained experience in leading and managing a project of real value to the school. The project developed relationships with staff, parents, pupils and external stakeholders and has enabled the promotion of the school's aims and objectives throughout the school community. The environmental area and outdoor classroom has provided the opportunity for the children to explore the environment, and the whole school has been involved in the enjoyment of the school grounds as part of National Grounds Week.

Where the project is now

"Our environmental project is an ongoing project with absolutely no limits on what we would like to achieve. I have applied for bird boxes sponsorship and to celebrate the launch of National Nest Box Week 2007, we are running a competition for the children to design a bird box. The winning design will be made up and put in the trees (even if it does have roses painted around the 'door'). I am also trying to get sponsorship for a bird box webcam."

"Without the CSBM none of the wonderful outdoor events would have happened and the children would have missed out on so many extra experiences. I am now involved in so many aspects of school life. I can wholeheartedly support this programme and am extremely grateful for the opportunities it has given me."

Project case studies summaries **continued**

SWOT analysis

Strengths

Enthusiasm, support and interest of staff, pupils and parents
Support of external stakeholders
Grounds ideal for development
Future plans incorporated onto plan of area
All staff share vision

Weaknesses

Accessing external funding requires time for research and evidence-gathering
More involvement of pupils needed to ensure success and ownership of project by entire school community

Opportunities

Varied and exciting future stages of project
Introduction of bird- and bat boxes and webcams
Links with Vale of Belvoir Lions
Involve school council e.g. to write letters for sponsorship of aspects of project, such as bird boxes
Link with the local farmers' market

Threats

Available time
Available funds
Second half of autumn term always far too busy with preparations for Christmas play etc
Maintaining momentum and interest

PHOTO REDACTED DUE TO THIRD PARTY RIGHTS OR OTHER LEGAL ISSUES

PHOTO REDACTED DUE TO THIRD PARTY RIGHTS OR OTHER LEGAL ISSUES

Kerry Snell
CSBM graduate

Project: Performance management reviews for school support staff

School background

Southway Primary School is an urban school set in a large housing estate in North Plymouth. There are currently 318 pupils aged between 3 and 11 years, and of these, 36 attend the nursery part time. The school is currently federated with three other schools.

The school has had Beacon status and has gained various awards in previous years, including Arts Mark, Investors in People, Sport England and Basic Skills Agency Mark.

The school has faced many changes in the last few years with some very experienced members of staff retiring. The headteacher retired in December 2004 and for the spring and summer terms of 2005 the school was led by the associate headteacher. During the summer term, the governors appointed a new headteacher who took up the post in the autumn term of 2005.

Project importance

The school is facing, for the forthcoming financial year, a vastly reduced budget due to a falling roll and rising costs. As a result of budget predictions, the staff have had to face the threat of redundancy. The current staff structure of 56 includes 38 support staff.

A performance review procedure for teachers is already in place. Although reviews of support staff have taken place in the past, these have been sporadic, with no formal process or documentation kept. With this in mind, together with the implications of workforce remodelling, it was decided to formalise performance reviews for support staff, and this therefore became part of the school improvement plan for 2006-07.

Project implementation

The existing process for teaching staff was examined and areas identified that could be used to form the basis of a review system for support staff. Meetings were held with all the stakeholders, a working document which detailed how the process would work was produced and a timetable for its implementation was put together.

Information was gathered from various sources including DfES, the local authority and other schools. It was identified that there was not a specific reference to support staff within the existing performance management policy. The candidate rectified this by writing a section and submitting it to the governing body for approval. The support staff section was approved and is now included in the policy.

“I chose this project primarily because it had been identified as an area for action in our school improvement plan. I feel strongly that all staff within the school should have the opportunity to develop personally, as well as be part of the school’s future. In implementing a structured process for reviewing the support staff, we will enable them to develop their skills, learn new skills and share best practice. This in turn will improve motivation and make every member of staff feel valued, ultimately ensuring that the school is effective and moves forward.”

Project case studies summaries **continued**

Michelle Harris
CSBM graduate

Project: Future provision of school meals service at Shiplake Church of England (CE) School

School background

Shiplake CE Primary School is a popular, voluntary-aided school situated in a rural area to the south of Henley-on-Thames, Oxfordshire. There are currently 185 children aged 4–11 on roll. Numbers are rising rapidly in this oversubscribed school. The standards achieved in tests at Key Stage 2 in all core subjects in 2004 place the school in the top five per cent nationally (2004 Ofsted Panda Report).

Project importance

The provision of school meals is managed and controlled by County Facilities Management. The quality and value-for-money element of this provision has been declining over the past few years and the overall management of the school meals service, particularly staffing, has given cause for concern. Issues raised by the recent Jamie Oliver School Dinners television series and related concerns over the nutritional content of school meals have placed the

subject high on the agenda of school improvement, at school, county and national government level.

Parents have expressed their concern over both the nutritional balance and the content of school dinners. Concerns over the quality of school dinners, the rise in obesity and related diseases (such as diabetes) have been raised. Within the local authority, all schools are now being consulted on the future of school meals provision.

The Every Child Matters agenda, and its associated national framework for change promote five outcomes that are key to well-being in childhood and later life: being healthy, staying safe, enjoying and achieving, making a positive contribution and economic well-being.

Project research and implementation

To form the basis of the evaluation, data and information have been collected from a variety of sources, such as parent and pupil questionnaires, school and local authority financial planning data and discussions with alternative service providers.

Stakeholder views:

- parental concern over nutritional content
- pupil complaints of boring choices
- recent increase in daily costs without noticeable improvements in standards

Market analysis:

- decreasing numbers of children taking school meals
- large numbers of parents indicating that they would support a change in lunchtime arrangements, but not the removal of a hot meal option
- pupil desire for input into the menus on offer
- reports of partnership schools using alternative healthy-option providers seeing increased uptake of service and good customer satisfaction levels

Financial analysis:

- financial liability of removing school from the current contract
- set-up costs for new in-house service
- additional management responsibility if the service is brought in-house
- risk that long-term interest in new provision will not be sufficient to ensure financial viability
- risk that increased uptake could disappear after initial, high-profile rush

Key recommendations

- Unsubscribe from local authority contract.
- Work towards formalising a cost-effective contract and comprehensive service level agreement with a local independent provider.
- Retain existing staff to oversee all servery and cleaning duties, subject to Transfer of Undertakings (Protection of Employment) (TUPE) regulations.

- Ensure that current local authority funding covers set-up costs (purchase of plates, cutlery, warming trolley, uniforms etc).
- Work with partnership schools for economy-of-scale prices by bulk buying from local providers, and form a cluster group for kitchen staff to share good practice and training skills.

From the research carried out for this report, it has become apparent that there is no single way to make these improvements that meets entirely with all stakeholders' requirements and the expectations of Every Child Matters. The school must establish a middle ground which will improve the quality and type of foods on offer and will be economically viable in terms of value for money, staff management and minimal financial exposure for the school.

Evaluation and impact

External evaluation summary

This evaluation summary covers the study of the national CSBM course, its impact on candidates and their schools; together with an evaluation of the pilot arrangements for DSBM and an impact evaluation of the national roll out of DSBM on candidates and their schools.

Evaluation of the BDP is in the final year of a three-year contract with the University of Hull. Previous work has focused on feeding into the course review project in order to ensure the quality and enrichment of CSBM and DSBM content and delivery.

In 2006-07, we consolidated the various strands of our research and began to assess the programme’s impact on schools and on candidates’ professional development. Quantitative and qualitative data have been taken from many sources, notably candidate interviews and questionnaires and feedback from delivery providers and key stakeholders.

As over 3,500 candidates have completed the BDP courses, the evaluation team has been able to collect and analyse a considerable amount of data. A final evaluation report, to be published in April 2007, will present the results of the full three-year study, considering the impact of the courses and making recommendations on how NCSL might develop the BDP and the SBM profession in the future.

The evaluation methodology has employed the principles of realistic evaluation and used both quantitative and qualitative methods of data collection.

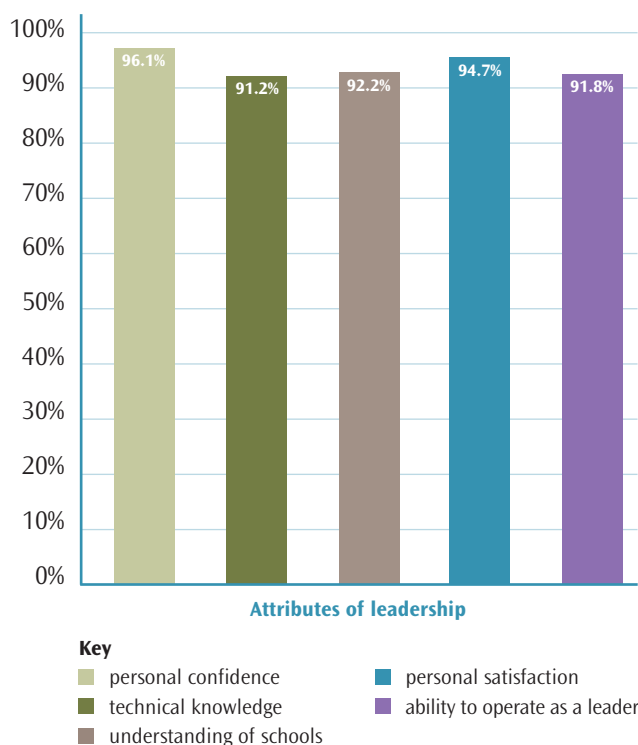
The following summary findings cover the national CSBM course and its impact on candidates and their schools, an evaluation of pilot arrangements for DSBM and an impact evaluation of the national DSBM course on candidates and their schools.

Findings – CSBM

Overall, CSBM has been a very successful course, providing opportunities for candidates to enhance their leadership, administrative and managerial capacities in an educational setting. It has laid the foundations for advanced professional development in the occupation of school business management.

A key outcome of the CSBM course has been the development of leadership skills among its graduating SBMs. Figure 4 summarises the views of a sample of 283 graduates about the course.

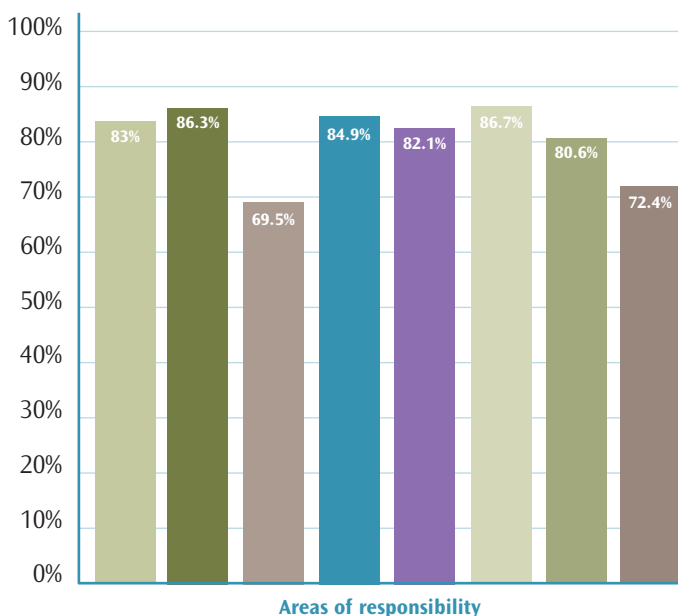
Figure 4: CSBM graduates’ rating of course impact on their leadership attributes



In terms of self-reported impact in their schools, SBMs were similarly encouraging in their response to the following question:

As School Business Manager what impact do you feel you currently have on the following areas in your school?

Figure 5: CSBM graduates’ reported impact on schools within key areas of responsibility



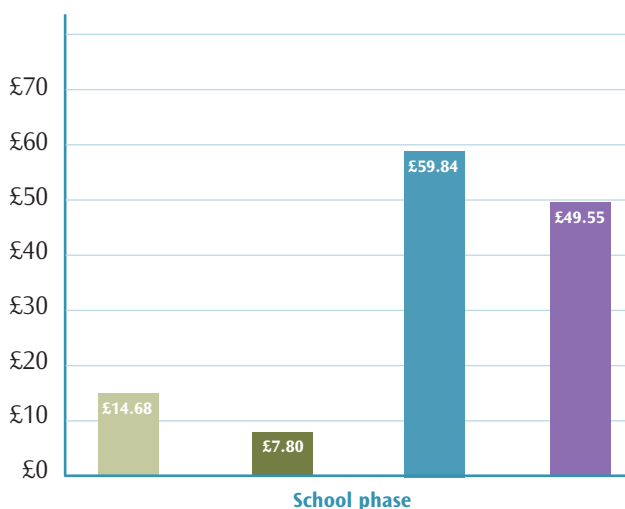
- Key**
- health and safety
 - facilities
 - ICT
 - financial management
 - HR
 - administrative
 - risk
 - strategic development

CSBM school business managers reported significant changes in how they have used their time as a result of the course. This included a substantial reduction in time spent on routine administration with that resource devoted instead to leadership and management activities.

In addition, the CSBM course has provided a significant opportunity for SBMs to develop networks with one another through talk2learn and informal regional face-to-face meetings.

SBMs increasingly reported attracting additional funding for their schools and also achieving savings. Figure 6 shows this on a per-pupil basis.

Figure 6: CSBM SBM’s average per pupil savings and additional funding raised



- Key**
- primary CSBM’s savings
 - secondary CSBM’s savings
 - primary CSBM additional
 - secondary CSBM additional

In-depth interviews, in the form of professional conversations with a sample of SBMs, confirmed the value candidates placed on the course, the materials and the tutoring. A particular benefit mentioned by SBMs in primary schools was that the course was free of charge to schools in the maintained sector.

Findings – DSBM

Following an extensive pilot of DSBM, the national course was successfully rolled out in November 2004. The provision of a course at a more strategic level has helped SBMs to function as members of their school's senior management or leadership teams. In addition, the course has contributed to the professional development of SBMs by providing a framework within which they can progress.

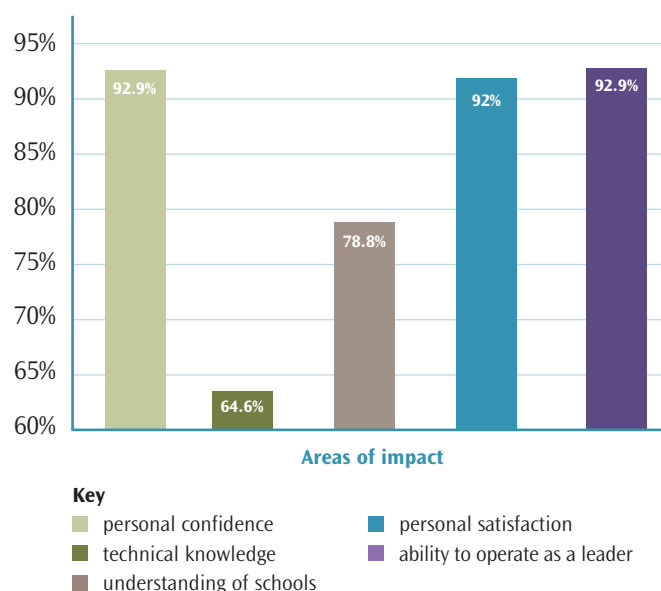
Many SBMs have progressed from CSBM to DSBM and some have moved on to degree programmes in School Business Management. Some senior SBM, graduates of DSBM, are now sending their junior colleagues for CSBM training.

After completing the three DSBM modules (strategic management, school improvement and change management), over 75 per cent of graduates surveyed reported increased understanding and impact as a result of the course. Similarly, for school improvement, 72 per cent reported increased understanding and impact in school and for change management, 83 per cent reported improved understanding and impact in school. Furthermore, 89 per cent indicated that their role had changed as a result of the course, and 77 per cent were now full members of their senior management or leadership teams. Graduates reported an increase in the time they perceived to be focused on leadership activities, and a reduction in time spent on administration. These factors pointed to a significant and developing role and one that will continue to have impact in schools.

SBMs felt strongly about the course's personal impact, with course satisfaction rated very highly.

DSBM school business managers perceived that their relationship with their headteachers was the crucial factor in the development of their role and in enabling them to have impact in schools. The attitude of the local authority was also a factor.

Figure 7: DSBM graduates' rating of course outcome



Other findings

Responses from a sample of headteachers indicated strong support for these courses, although not all SBMs' headteachers were available for interview. In some cases SBMs indicated that their relationships with headteachers were difficult.

This finding underlines the central importance of the SBM–headteacher relationship in the programme's impact. It highlights the fact that for the wider development of SBMs, some headteachers – as well as some local authorities – still need to be convinced of the value of the courses.

Recommendations

The research provides clear evidence that the programme is having a significant impact in schools. In the light of this, the following recommendations are made.

- Some DSBM graduates expressed interest in a higher level of professional recognition, and further training to support the emergence of a consultant SBM role. Such training would take into account the needs of SBMs working in consortia, federations or extended schools where the organisational management is more challenging and complex.
- Further work is necessary to ensure that course content remains relevant to the needs of schools and their SBMs, reflecting the development of initiatives such as extended schools, Every Child Matters, school meals, academies and the Building Schools for the Future programme, which have become central to the school agenda.
- Leadership of school support staff is a responsibility of many SBMs. The findings suggest this should form part of future revisions to DSBM.

75%

of DSBM graduates surveyed reported increased understanding and impact on their school as a result of completing the course

3,500

candidates have completed the BDP courses

91.8%

of CSBM graduates report increased ability to operate as a leader

89%

of DSBM candidates surveyed indicated their role had become more management and leadership orientated as a result of completing the DSBM

77%

of DSBM graduates were now full members of their senior management or leadership teams

BDP impact in schools

Over the last 10 years, the education landscape has changed considerably. Schools have gained increasing independence in deciding how and when their resources are deployed. With greater self-governance comes greater responsibilities for school leaders to manage and lead effectively as well as the need to be accountable for their decisions. The landscape has been shaped by a number of fundamental policy initiatives including Every Child Matters, workforce remodelling, the 14–19 agenda and extended schools, all of them designed to extend the range of services offered to children and to improve their social and academic attainment.

The PricewaterhouseCoopers report on school leadership (PWC, 2007) found that ‘Headteachers recognise that they are struggling to create sufficient time to engage effectively in the various strategic issues they are required to deal with’ (p vi).

It is this very issue that served as the catalyst for the BDP. The programme was developed to ensure that SBMs were equipped with the knowledge and competence to assume some of their headteachers’ operational duties, and to provide expert advice to the senior leadership team on the effective deployment of resources.

In August 2006, NCSL commissioned a small-scale study on headteachers’ perceptions of the SBM role and how the role and the individual have developed as a result of the BDP. The results of this study, with illustrative quotes from headteacher interviews, are summarised below.

Effective use of SBMs’ skills

Allowing more time to focus

The data collected underlined headteachers’ appreciation of the new skills learnt by their SBMs as a result of BDP training. SBMs offered many headteachers the additional time, expertise or advice that allowed them to work more strategically or to be more visionary.

An example of this is the SBM’s ability to share the administrative load so that the headteacher can focus on developing the teaching and learning side of the school. In many schools, SBMs are taking the opportunity to contribute to their school’s strategic development:

Having somebody on my leadership team who can input that financial knowledge into my school improvement plan is vital. As a primary head, I think my key role should be looking at the quality of teaching and learning. I think that you should be able to trust your SBM to work alongside you. I know that my bursar is top-notch and if I hadn’t been working with one then perhaps I would have had to spend more time on their area of work, but then that would have detracted from teaching and learning.

Without her I would be lost in terms of HR contracts, premises issues. It’s not only the day-to-day stuff. It’s the way she can look from a dispassionate distance at what is going on and provide technical expertise.

A business manager has the overview of the school and it does allow me then to be a bit more visionary, and strategic.

Leading school improvements

Some heads highlighted areas of significant change in their schools following BDP training for the SBM. These included leading on embedding performance management across the school, raising the profile of support staff and devolving responsibility to support roles to free up leadership and teaching time. One SBM was implementing new systems to increase the efficiency and effectiveness of administrative tasks. Another focused on getting the school through the rigorous Investors in People process:

It was her idea that we did Investors in People. She said how valuable it had been in terms of teamwork and I thought, “OK, right, we’ll go through that”. I went on the training and I thought, “actually this is going to really work with school improvement” The process just helps everybody pull in the same direction – that was due to her.

Extension of the SBM role

Delivering beyond expectation

The study also indicated that as a result of the training, many SBMs are diversifying into work that extends beyond their natural remit. Some of the headteachers interviewed gave accounts of SBMs taking on deeper leadership roles, working strategically, even changing the culture of their schools and empowering people to lead. It found that SBMs got involved in supporting teaching, by mentoring pupils in the approach to exams, operating Young Enterprise programmes and supervising students on school trips.

The results also point to the growing scope of the SBM role. For many headteachers, SBM development was so significant that they had begun to see their SBMs as integral to the success of the school, vital players in making the school what it was:

People say, "Oh I've got a deputy head who does that" and I think, "Oh, more fool you". In my view not having an SBM is crazy.

I could not conceive of running the school without one, not at all.

Creating confident, able managers

Graduates of both CSBM and DSBM courses are spending more time on management and less on administration. This is the case across primary and secondary schools, with the biggest reduction in administrative work in primary schools, where SBMs reported an approximate 20 per cent drop.

Of equal importance is SBMs' growing confidence in handling increased managerial responsibilities. Almost 80 per cent of CSBM and almost 93 per cent of DSBM candidates expressed confidence in their ability to operate as leaders.

This has had a corresponding impact on the headteachers surveyed, many of whom spoke about the effect of having well-trained SBMs in their schools:

I couldn't have done the workload without my SBM. For the first time in a small school I've got the luxury of having a senior management team. Doing the SBM course has brought tremendous benefits. I felt confident that work I had delegated would be in hand. That released more time for education.

Plans for the future

The need for sound business management and decision-making skills in our schools is now widely accepted. Effective SBMs help schools address the managerial and administrative complexities that confront them and in doing so release headteachers and teachers to do what they do best, teach and develop the curriculum.

By introducing a business management discipline into both day-to-day operations and strategic decision-making in our schools, SBMs can make a significant contribution to improving the effectiveness of schools, which in turn contributes to an improvement in the life-chances of our children.

The PricewaterhouseCoopers report on school leadership (PWC, 2007) has raised further the importance of school business management, particularly in the area of distributed leadership.

Consequently, whilst we plan to deliver through commissioned contractors 1,575 CSBM and 325 DSBM places in 2007–08. We will continue to adjust and refine these courses so that they:

- are readily accessible and reflect demand
- impact on schools by freeing up teachers to teach whilst introducing an effective business-making discipline into schools
- equip SBMs with the breadth of skills and competence to help their schools address the challenges that confront them
- raise the profile of SBMs both nationally and internationally, through our links in particular with the Association of School Business Officials (ASBO) and the Western Cape Education Department (WCED).

During the period 2005/07, our three priorities were:

- managing demand for places
- maintaining quality whilst introducing personalisation and localisation of learning
- impacting at candidate and school level

We believe that in 2007/08, we will remain focused on these priorities by taking forward the following activities:

- a fundamental review of the content and structure of DSBM
- completion and implementation of APL arrangements for both courses by autumn 2007
- piloting and evaluation of a localised DSBM course
- completion of arrangements for graduates to update their learning
- publication of Hull University's three-year impact study and NCSL's baseline study, taking forward their recommendations

Finally, the publication of the PWC report presents NCSL with an opportunity to raise the profile of the SBM profession still further, a vital task we must undertake during 2007–08. We intend to review the appropriateness of our current courses to ensure that they complement and support the recommendations of the PWC report.

If necessary, we will introduce new materials to our existing courses and consider the development of additional modules or higher level SBM courses to assist in the delivery of these recommendations.

Appendix 1: Programme partners

Training and Development Agency for Schools (TDA)

TDA was launched in September 2005. Formally the Teacher Training Agency (TTA), TDA's change of name reflects its expanded remit for the school workforce as agreed with DfES. Part of this remit includes taking over policy responsibility for the BDP from DfES.

TDA works in strategic partnership with NCSL to further develop the BDP and promote the SBM role. The agency publishes the booklet *Looking for a Bursar* and maintains information on its website (www.tda.gov.uk/leaders/support-staff/bursars). Together these promote the role through a business case for heads and governors; a modular job description to help schools assess their specific needs; and a growing number of case histories that demonstrate the impact bursars are having, covering such aspects as extended school services and managing major building projects. Other examples show how bursars can play a significant role in implementing the principles of best value by making the most of all school resources in a sustainable and environmentally friendly manner.

Manchester Metropolitan University

The MMU's Institute of Education (IoE) is a provider for both CSBM and DSBM and has been instrumental in developing content since 2003. The IoE believes that the programme positively impacts on both candidates and their organisations. This impact is particularly shown in candidate empowerment and improvements in the practice of running schools.

The MMU has developed a BA (Hons) in School Business Management and since September 2005 has supported NCSL in developing SBM programmes in South Africa and the USA. Several MMU publications have also contributed to the academic development of the profession.

Serco Education and Children's Services

Serco has been associated with BDP from the outset. It has a long tradition of providing executive coaching and high-quality leadership and development programmes to headteachers and leaders in schools at all levels.

BDP fully complements Serco's commitment to supporting school improvement and effecting changes that benefit the learning experiences of children. It views this programme as an integral part of its overall strategy for supporting leadership succession planning in schools and is delighted to be associated with its continuing success.

University of Lincoln

The International Institute for Educational Leadership (IIEL) at the University of Lincoln has been researching the role and function of school business managers since 1997 and works with bursars at an executive level on its MBA programme in Education Leadership.

IIEL developed the pilot courses for CSBM and DSBM with the support of expert SBMs. It currently delivers DSBM in three regions.

Institute of Administrative Management (IAM)

The mission of the Institute of Administrative Management (IAM) is the promotion of the science of administrative management. IAM believes that its work with CSBM and DSBM exemplifies this goal.

IAM's accreditation of the BDP courses means that CSBM graduates also receive the IAM Diploma in Administrative Management, and DSBM graduates are awarded the IAM Advanced Diploma.

IAM believes that as the SBM profession evolves, IAM accreditation will support professional standing and give the SBM qualification added currency both within and beyond the world of education.

University of Hull

The University of Hull is concerned with the qualitative and quantitative evaluation of CSBM and DSBM through its BDP longitudinal evaluation study. Feedback from candidates, their heads and governors indicates that the impact of BDP continues to grow. One headteacher, in the course of remodelling the school workforce, chose to focus on changing the role of the school administrator in order to leave time to focus on leadership practice. This head commented: "NCSL's CSBM course was pivotal to this change and has helped transform not only the job description and work practice of the school administrator, now school bursar, but also the school office arrangements."

Line Communication Group

Line Communication Group (Line) has been providing e-learning business solutions since 1989 through consultancy work, content development and technical expertise and implementation.

Line developed the new CSBM online induction module and is engaged in maintaining and updating CSBM and DSBM materials. It is currently conducting a review of online materials from a pedagogical and technical perspective, and is mapping existing materials against NCSL's e-learning standards and making recommendations for development.

Radcliffe Gower Education and Training

Radcliffe Gower Education and Training (Radcliffe Gower) has been involved with BDP since 2003 when it was contracted to recruit applicants for the DSBM external managers initiative, a role that it has continued to play for both CSBM and DSBM. It also offers advice and guidance, including help with job applications, to those seeking to enter the profession from other sectors.

Radcliffe Gower was commissioned by DfES in 2004 to research various aspects of the SBM profession.

One of the key findings was that those working within the profession as well as those seeking to join it experienced difficulties in finding suitable posts. In response, a website (www.bursarjobs.co.uk) was developed as a one-stop shop for SBM jobseekers. The site has been a great success, promoting some 1,500 jobs in the last two years. The site attracts nearly 2,000 visitors a week in peak periods.

National Bursars Association

The National Bursars Association (NBA) is a professional association for bursars. Established in 1996, it has a growing membership and is well respected by DfES, the National Remodelling Team and other major stakeholders in education. NBA has been pleased to work with NCSL on BDP as it impacts on school support staff.

Appendix 2: Glossary

Abbreviation Definition

AAT	Association of Accounting Technicians
APEL	accreditation of prior experience and learning
APL	accreditation of prior learning
ASBO	Association of School Business Officials
CPD	continuing professional development
CSBM	Certificate of School Business Management
DfES	Department for Education and Skills
DSBM	Diploma of School Business Management
HR	human resources
IAM	Institute of Administrative Management
LCC	Learning and Conference Centre (Nottingham)
NBA	National Bursars Association
PESTLE	a scheme for assessing an organisation's status in terms of its political, economic, social, technological, legal and environmental circumstances
SBM	school business manager (bursar)
SWOT	a planning and assessment strategy (the letters stand for strengths, weaknesses, opportunities and threats)
TDA	Training and Development Agency for Schools
WCED	Western Cape Education Department (Cape Town, South Africa)

Appendix 3: References

DfES, 2003, *Every Child Matters*, CM 5860, Norwich: HMSO

PricewaterhouseCoopers (PWC), 2007, *Independent Study into School Leadership*, RR818A, Norwich: HMSO

To order a copy of this publication,
please email bursar@ncsl.org.uk
quoting the reference [bursar/fullreport](#)

**National College for
School Leadership**

Triumph Road
Nottingham
NG8 1DH

T: 0870 001 1155
F: 0115 872 2001
E: ncsl-office@ncsl.org.uk
W: www.ncsl.org.uk