



National College for  
Teaching & Leadership

# **School business manager learning programmes evaluation**

**Case study report - School business  
director (SBD) pilot programme**

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## Preface

Since this research was completed and the reports finalised, proposals for how school business management (SBM) programmes will run in the future have changed. They will not move to a licensed approach as set out previously.

This new approach brings the SBM programmes into line with the ambition to create a self-improving, school-led system. It represents an exciting opportunity for the profession to take ownership of its leadership development and ensure that the role of school business managers remains as a critical element of effective school leadership and school improvement.

Content from the Certificate of School Business Management (CSBM), Diploma of School Business Management (DSBM) and Advanced Diploma of School Business Management (ADSBM) will be made freely available with the expectation that a number of training providers will run the programmes independently. NCTL will no longer manage the programmes and accreditation will be overseen by the Institute of Leadership and Management.

NCTL used the findings of the evaluation to further develop the school business manager programmes prior to the decision to make the materials freely available. The reports are now being published in order to share the findings with potential training providers.

## Structure of reports

This document is one of a set of reports from the school business manager learning programmes evaluation.

This report includes four case studies aimed at providing a cross-section of early experiences in the pilot SBD programme

We recommend that you read all the reports to understand the research fully. These documents are available from gov.uk. The complete set of reports includes the following:

- **Final summary report**

Reviews the evidence from all the research in the light of 3 key questions: the impact on participant development; the impact on participants' schools, and the delivery strengths and weaknesses.

- **Case study report - School Business Manager Programme**

Three case studies focused on the impact of the programmes upon the participants and their role in school or college.
- **Case study report - School Business Directors (SBD) in Schools/ Federations in Receipt of a Primary Partnership Grant**

Four case studies aimed at supplementing the early case studies by focussing on those undergoing development as SBDs but also within school collaborations awarded primary partnership grants.
- **Technical annexe – Primary Partnership Data**

High level analysis of the NCTL survey of recipients of primary partnership funding focusing on the understanding the impact of the primary partnership grants.
- **Technical Annexe - Review of SBM/D end of programme satisfaction surveys**

Overview of the end of programme satisfaction surveys administered by NCTL and training providers, completed by participants of the Diploma of School Business Management (DSBM), the Advanced Diploma of School Business Management (ADSBM) and the School Business Director (SBD) programmes.
- **Technical Annexe – Interim report on the evaluation of the school business management (SBM) programme**

The first of the interim analyses from the research, originally written in 2011 and published now to provide supporting information to the final report.
- **Technical Annexe – Final evaluation report of the school business directors pilot**

The final evaluation of the school business directors pilot, written in 2011, focusing on the experience of the two entry cohorts of the SBD pilot programme.
- **Technical Annexe – Impact Assessment**

An assessment of the impact of the Certificate (CSBM), Diploma (DSBM) and Advanced Diploma for School Business Managers (ADSBM) and the School Business Directors (SBD) Programme on the individuals that had undertaken the learning and on their employing institutions.

## Summary of case study evidence for School Business Directors (SBD) Pilot Programme

**The case studies:** These covered participants entering the first pilot year of the new programme (September 2010-July 2011) and included:

- Sandra Wootton of Bishop Bell Church of England Secondary School, Eastbourne (East Sussex).
- Diane Houghton of Croftway Schools Primary Partnership (Converter Academy Group), Blyth (Northumberland); previously Blyth Community Schools Cluster (six schools partnership cluster).
- Kerry Snell: St Boniface Roman Catholic College (Comprehensive), Plymouth; previously Coombe Pafford School, Torbay (Devon)
- Lynn Young of Smestow School (Comprehensive), Wolverhampton (West Midlands).

Participants were selected from the first pilot entries to reflect a cross section of experience by background of the participants, and the (host) school(s).

**Aim of the case studies:** These interviews aimed to provide a cross-section of early participants experience in the pilot SBD programme, and in particular during the programme, shortly after graduation and a year and half after graduation, looking at:

- Their school role and responsibilities and schools wider involvement with NCTL programmes.
- School context and relationship of SBD participation with school development needs and priorities and activity.
- Participant and school expectations of the SBD programme and how these have continued to have evolved.
- Participant/school views on content, added-value and challenges of the programme.

A feature of the case studies was the participants' experience of impact, using 'a tracking back' approach. This focused on the developing benefits for the individual participant and for wider school practice.

**Scope and coverage:** Interviews with each of the four participants were conducted on a staged basis to fit in with individual roles and responsibilities, and specifically:

- January 2011 - mid-programme and five months after enrolling (interviews with participant; head of host school; and at least one other on colleagues on senior leadership team).
- December 2011 to March 2012 - typically six to eight months after graduating (interviews with participant only).
- December 2012 to March 2013 - one year on from the first follow up interview and 18-20 months after graduation (interviews with participant).

All interviews have been written up, verified and shared with NCTL on a staged basis and have been written up as summary case studies in 2013.

**Common learning issues from the SBD cohort:** Participants had been recruited from different backgrounds - some with past experience of CSBM, DSBM and ADSBM but not all. The case study evidence showed:

- All have come from school or school partnership contexts where school leadership was strongly committed to professionalising the business management role, and SBD was widely seen by school leaders as having supported this.
- Specific motives of participants for undertaking SBD varied but typically involved a mixture of personal development expectations and/or career development, and expected contributions to school leadership (and/or partnership) capacity building.
- Programme content was relevant, stretching but also widely well-received, although some had early problems with the clarity and pace of the programme. Experience of past SBM programmes and/or higher education experience helped participants cope.
- Many aspects of SBD were valued but most commonly these included: the integration of face to face session and scenario-based group work; research skills and critical reading; and (where conducted) also the placements and reciprocal visits.
- The 'blended' programme approach was welcomed by all as was the personalised focus which allowed (some) of the content to be selected and designed to reflect current school or partnership development issues in their own schools.
- Experience of tutor support was generally good although in some cases there had been some initial 'mismatching' of individuals with tutors. In contrast, others felt the coaching support to be a highlight of the programme.

All interviewed welcomed the informal learning opportunities and especially through inter-participant support and networking. This was an early 'added-value' feature of

SBD, building confidence and sharing ideas, and for most this collaboration has continued in some form among contemporary participants.

**Common issues emerging for impact:** Positive impacts were identified by all case studies - for both individuals and their learning, and also for schools and where this was endorsed by interviewed school leaders. More specifically:

- All saw some early benefits for themselves and/or their job role such as greater understanding of current education policy developments, and this helped sustain the momentum of participation mid programme.
- A common and continuing impact was to self-confidence in working within senior leadership teams and making more active contributions to school improvement issues and responses.
- The opportunity to customise project and research work in the programme to relate to specific school needs also enabled early impacts - on diverse issues across participants but often including better understanding academy conversion issues or contributing to academy transitions. These issues were all of immediate relevance to schools. This is also provided an early demonstration of SBD potential to others on school leadership teams.
- The greater knowledge and theoretical understanding developed through the programme enabled concrete benefits particularly around systems leadership.
- A common feature was the opportunity provided by SBD to gain greater awareness of the implications of the wider policy context within which schools were developing such as cross-school working and improvement support.
- The greater knowledge and capabilities in strategic understanding on the part of the participant was commonly reported to have enabled Headteachers to be released to focus on specific teaching and learning and related school improvement issues including addressing Ofsted inspection improvement issues - a key objective of the SBD programme.

Where schools were engaged in partnership developments and collaboration, participants were able to make a more systematic contribution to building collaborative frameworks, often using systems leadership principles learned through the SBD programme.



## School Business Director (SBD)/Primary Partnership (PP) participant case study: Sandra Wootton, Bishop Bell School, Eastbourne

This case study is drawn together from a series of interviews with Sandra (Sandy), as well as selected colleagues. Interviews were carried out in January 2011, November 2011 and January 2013 covering over two and half years from joining the first SBD cohort. The baseline interview involved conversations with the SBD participant, the executive headteacher and their deputy (Sandy's mentor on the programme). The first follow-up discussion, and concluding interview both involved semi-structured telephone interviews with Sandy. All interview reports have been verified.

### **Summary: The SBD Programme**

- Sandy's development has been directly contributed to by the SBD programme, and this has contributed directly to managing emerging morale issues at the school in the last year.
- The programme content was seen as responsive to the needs of schools, by Sandy and also by the senior leadership team, and directly relevant to the continuing improvement agenda of the Bishop Bell School.
- She had early difficulties with the intensity of the programme, but was able to address these through self-organisation to manage the continuing high demands of her 'day-job' and the programme. The problems of pace were thought to have eased in the second half of the programme.
- Sandy especially welcomed the face-to-face sessions although at times finding these demanding to engage with.
- She also welcomed the opportunity to develop critical reading skills and highly valued the blended approach re-enforced by the continuing support of her tutor.
- While welcoming content she felt there was scope for improvement in the on-line content, the timing of delivery of module supporting documentation, and that more consistency was needed across participants for tutor support.
- She saw early benefits for her confidence in the job role, and contributions to the school leadership team, and to wider school collaborations, and has continued to benefit from her greater understanding of education policy issues.

## 1. Participant and school background information

### **Bishop Bell School: Key facts**

Location: Bishop Bell School is located in Eastbourne, East Sussex

Scope: Church of England Secondary School

Age range: 11-16 years

Size: 1,040 pupils

Other: Ofsted have recently rated Bishop Bell a 'Good' school with many outstanding features (2012).

**School and business management context:** The Bishop Bell Church of England School is a voluntary aided secondary school and at the time of commencing the SBD programme was graded as one of the most improved schools in the country. The school had been graded outstanding in 2010 and its results had improved every year for 13 years. Results continue to improve but a specific safeguarding issue saw an otherwise highly complimentary Ofsted's inspection in 2012 grade the school as good. Inspections have regularly noted the strong Christian ethos in the school and the positive impact of the spiritual life of the school and the quality of learning across the whole school.

Located in a suburb of Eastbourne, the school is over-subscribed. Its students are drawn almost wholly from white British heritage reflecting the local composition of the population, and the number of pupils with special education needs and/or those with disabilities is close to the national average. The school describes itself as having several distinct functions of which 11-16 provision is the largest but which also includes adult learning to the community, a nursery and a range of post-16 provision including some provision for its own apprenticeships.

The school was seen as continuing to provide excellent support in meeting the needs of its learners. In this, it was among the first mathematics and computing specialist schools designated in the country - focusing on mathematics and computing since 2002 and with an accelerated KS3 programme of studies and an extended KS4 programme which substantially enhances curricula. It was awarded High Performing Specialist Schools Status in 2010, and has received various national and local awards including the Bishop's Commendation for its work for

partnership schools and where among other links it leads a close partnership with the Causeway secondary school in Eastbourne.

The loss of outstanding status in the school in 2012 followed the involvement of a school teaching staff member in a high profile safeguarding issue. Subsequent, reviews by the local authority have endorsed the quality of school systems, and East Sussex County Council have since asked the school to be a support school within its county-wide Schools Alliance. However, the effect has been a hiatus in the school's wider development and has meant Bishop Bell could not pursue its aspiration to be a teaching school.

The participant has been with the school as its business manager since 2006, but had previously worked in school finance roles since 1998. She holds a business management degree from earlier part-time study. A member of the senior management team (SMT) at the school, she has a wide functional brief and leads the school's diverse support staff (of 80 people) reflecting the self-reliance built up in the school for all areas of management.

The participant has been described by other SMT members as a lynchpin in growing this functionality, with development and refinement of support systems which had been thought to have been previously neglected and to respond to the culture articulated by the team of 'excellence in everything we do'. This has seen professionalization of the cross school personnel management function and enhanced departmental administration including the appointment of functional middle managers to co-ordinate key support areas and build capacity and provide for greater delegation by professional staff.

Within the SMT the participant has a close working relationship with the Executive Head but also with heads of school and governors. In addition to this very broad role she has led on a number of partnership activities, and on the organisation of a number of local business manager conferences.

**Wider links with NCTL:** Sandy had first become engaged with NCTL in her previous school role where she was keen to develop a more rounded view of the school business managers role. She applied for the first cohort of the SBM certificate programme, which was over-subscribed and was accepted on to the second. In 2007 she joined the Diploma programme, and was keen to become involved with the SBD joining its first cohort.

## 2. Opinion of the SBD programme

**Participant expectations of SBD:** The school decided to opt for the school business manager model in the late 1990s. The focus was on harnessing a more professionalised management of non-teaching resources and activities in the school and to support reforms being introduced by the Executive Head shortly who joined in 1996. The school had then been described as in 'Serious Weaknesses' and was engaged with the local authority (East Sussex County Council) in a substantial improvement agenda. The initial stimulus, and an early priority, to the role was a need for financial acumen to make best use of the available budget. Aligned with this the school needed a focus for identifying and making best use of grant and revenue opportunities to enhance the available resources to better support learning.

The idea of undertaking the SBD programme came from Sandy herself and this was quickly endorsed by the Executive Head as a valuable further development of her capabilities, and which could enhance her profile and role on the SMT. Strategically, the school was also then starting to look to build on its excellence either by supporting less well performing schools and/or through Academy status which is now being actively reviewed. It was thought that the SBD role could contribute significantly to such developments. From a personal perspective the participant saw the SBD programme as a natural extension of the Diploma and providing opportunities to grow her leadership and communications skills.

She was made aware of the prospect of joining the SBD pilot at the final face to face event in the Diploma programme, and saw this as a natural progression. More specifically she felt that participation would increase her confidence to work within the increasing demands of the SMT, and enhance her abilities to work in external partnerships which she felt were becoming more significant to the school. SBD was also seen as a natural focus for developing her leadership skills which had been identified as a personal goal in the school's performance management system.

Both the Executive Head and the participant felt that their early expectations of the SBD programme had remained fairly consistent with the Head of School noting:

We had high expectations of this (the programme)...I think I can say they remain high and pretty much unchanged.

**Synergies with career development:** Sandy's motive for joining combined aspirations for personal professional development in the role with a strategic focus for further school development. The Executive Head and also the participant's in-school mentor and Head of School, felt that these were aspirations well-aligned to her own career development. By 2010, the school was very used to having a business manager but the Executive Headteacher described the role as having changed: '*...the role was far, far bigger*'. He described this as moving substantially from a bursar to something he recognised was close to the SBD model. Participation was consequently expected to contribute to the participant's role as a full and active member of the SMT, leading on key developments, and also directing the expanding business management function and team.

### 3. Content and added value of SBD

**Programme value:** The participant's experience of SBD has been very positive describing it as: 'Brilliant'. At its heart she felt the programme was timely, well placed and providing much more for the underpinning knowledge needed in the job role. She had some concerns with some specific aspects of the programme but regarded these as consistent with what might be expected of a pilot which is reaching into a new area of development.

The Executive Head was also aware that the structure and content of the SBD programme was highly applied and that this had enabled the participant to weave specific issues of strategic concern and development in the school into her own development. He also noted that even before the programme had completed she had been taking a much more pro-active role on the SMT and this was reflected in her growing confidence stemming from the programme.

Sandy derived particular value from relationships developed with a cadre of other participants on SBD. Being a part of the early cohort for the pilot programme developed a close bond between participants, boosted motivation, and also provided help on a few programme areas where she felt there had been less support from tutors. This was especially in the assignments related to policy analysis where ideas building and sharing of 'grey documentary' sources was an important extension to the available resources. She has since maintained contact with many participants, mainly through informal communications and as there were few graduates from London and the South East this has mainly been on-line. These links were valuable in the first post-graduation year but have been described as 'dwindling since then'.

**Programme design and delivery:** In terms of programme strengths, the participant focussed on the quality of assessment which was seen as robust and helpful in the feedback. She also focused on:

The blended approach...this really works well in putting together the different parts (of the programme)...its different inputs develop you in different ways.

She was not aware of any gaps in content, and felt the programme was well designed, relevant and responsive to current needs of schools at this level.

The participant had valued the face-to-face sessions although attending these while also managing a highly demanding day job had been a major personal challenge. Sandy felt she derived most value from these activities in the second half of the programme, and especially welcomed the critical reading, research and policy analysis content. This was seen as very stretching but was recognised by Sandy, and close colleagues, as substantially adding to her skills and knowledge. This content in particular has aided subsequent partnership work by the school, and has also been a particular focus for tapping her SBD learning in internal school developments.

Her placement was particularly valued. She negotiated a short attachment to the Academies Enterprise Trust, and this came at a critical time in building the school's knowledge of academy development implications. Sandy is a recognised authority on the school leadership team on these implications and a focus for guiding the school's continuing assessment of the relevance to Bishop Bell School if they were to opt for academy conversion.

**Programme improvement:** The participant had a number of concerns with content and suggestions for improvement, but while detracting from the efficiency of delivery these did not change her view that the programme was fundamentally sound. These included:

The quality of on-line support which was not seen as a strength in SBD and with potential to improve. It was felt that the on-line collaborative community had scope to be better integrated and used. Overall, Sandy felt that like a lot of participants she found this unhelpful and by the second half of the programme she made little or no use of it.

Documents were slow to come through and this was felt to risk: '...losing the momentum for engagement with SBD' and needing better aligning with delivery and content. She felt that this as much as the demands of content had raised drop-out rates partly due to frustrations and partly to what she said risked being a stop-start approach to the programme.

A related issue was that materials often arrived late for the start of modules and the delay or the unreliability of securing key documentation was not reflected in the deadlines. Consequently, submission and closing dates were seen as bigger challenges to busy people when they could not factor in reliable planning to prepare and conduct what was necessary. This needed to be addressed to help participants better balance their work and programme demands.

Coaching support was also seen as variable, and while her own coach had been helpful and supportive she was conscious that her experience of being able to build a relationship with one coach was atypical. She was aware that that several participants had several coaches and that more consistency was needed to help with continuity.

Sandy did not secure a reciprocal visit within the programme although had been looking forward to this feature of SBD. She felt that arrangements for organising this might have been better supported by NCTL. A particular issue here was that being based in the South East, she had few opportunities for such visits unless this involved substantial travel and disruption to the school. She felt geographically remote from many other participants and this constrained her opportunities for direct interface off programme with other participants, or for taking part in some of the regional or multi-regional groups which benefited others.

The participant's mentor felt that his role in support was potentially important and that provision within the programme had failed to give him sufficient guidance especially on issues such as timetabling of meetings with tutors, and what was being assessed when. He also felt that this was a justifiably demanding programme but if it was not be too onerous for busy people then it needed a more even spread of its demands and better information to assist individuals in planning their inputs alongside their day jobs.

There was already added value from participation from early on in the programme. Sandy felt that her knowledge and confidence about systems skills especially had been raised and this had directly affected her confidence within the SMT.

**Programme overview:** Sandy remains an enthusiast for SBD and for its role in supporting executive management of schools, but also feels that there are significant improvement opportunities for the programme. An important outcome for her has been in raising her confidence in taking a more pro-active role in the school leadership, in the management and direction of the large school support team, and in releasing the headteacher to focus on wider development issues. She feels she is now much better placed to understand and relate school improvement to national policy and to articulate consequences of policy changes and implications for the school situation and development.

## 4. Impact

**Impacts achieved:** The participant felt that the programme had a distinctive impact on herself and her work and role during the programme and after graduation, and this has continued. Some early impacts were identified:

- She had developed much stronger systems leadership skills and capacities and this was reflected in the higher profile she had taken after graduation from SBD in the East Sussex School Business Managers grouping (of 23 personnel) and its local sub-group. This has seen significant movement towards shared services and (in the Eastbourne group) early impact on more effective resourcing through some shared support costs.
- Enhanced role and value in the senior leadership team - which the participant felt was derived from improved confidence and communications skills but also specifically on the knowledge she could now display on policy analysis.
- Knowledge developed specifically on the academy initiative and academy conversion process, and where she was now seen to be a natural focus for information and opinion to shape the school and its strategic developments.
- Increased interface and development support with school governors - both at Bishop Bell and also the 'federated' Causeway school. This has come from her enhanced role on the school senior leadership team, and the engagement with higher level and strategic development issues across the school(s). She now regularly attends the school Executive Committee with Governors. The Executive Headteacher felt this came from a recognition that Sandy was a focus for policy related issues, knowing where to find information and a trusted colleague who was open to new ideas and opportunities. This is especially welcomed for the knowledge of academies and the implications for Bishop Bell for any future academy conversion.

These impacts were attested to by both the Executive Head and also the participant's in-school mentor. Both also felt that the participant was now recognised in the school as a senior leader who was contributing a particular knowledge on policy and school guidance to academy and related policy issues. A past focus within the SMT on preparing a strategic report on academy developments was seen as a direct consequence of her growing confidence and knowledge.



Subsequently, she has contributed in specific ways to school development building on this confidence and also knowledge from SBD. This included conducting a school leadership review for the SMT and governors. She also played an active role in the organisation of whole school in service education and training at a critical time following the safeguarding case brought against the school staff member. In this she has also become a crucial feature of what was described by the executive Headteacher as 'school resilience'. This has been especially important in helping to address what had become 'a deep and depressing effect on morale' across teaching and support staff over a protracted legal case and 'pulling people through', a process which is now thought to be well advanced.

The mentor acknowledged all of these impacts adding that other colleagues had noticed how she 'had grown in the SMT' and adding:

She is just much more engaged in the Senior Management Team...she has more presence.

He added:

She used to be seen as quiet...but that is no longer the case, she contributes, is proactive in discussions and is seen as knowledgeable and solution centred.

One further impact is the leadership role Sandy has taken on the development of the sub-regional SBM cross-school network. Here she is a senior member of the managing committee, with strong relationships across the 24 members, and a recognised influencing voice on cross-school collaborations and shared intelligence such as academy conversion developments. She was largely responsible for setting up and organising the network's first conference (in 2012). She feels the SBD programme had a substantial influence on her confidence and ability to undertake this role, and the significance of the network has risen since 2011 particularly as the local authority, under budget pressures and re-organisation, has been able to offer less direct support to schools in East Sussex.

**Sustainability of impacts:** The impacts achieved have proven durable and also provided foundations for continuing improvements. The Executive Head drew attention to the effects of SBD on early spin-offs for the school. He added that he would encourage other schools to follow their example where they had similar opportunities noting that:

This has been timely and really valuable...we would have paid for the full costs... but I doubt it is schools like us that you (the College) need to persuade about its (SBD) merits...it's going to need people like us to help to set out what difference it can make.

**Further impacts:** Future impacts will be geared to building the schools resilience after losing its 'Outstanding' status and to re-establishing its reputation for excellence in the county. Linked to this will be the support needed for any direct contributions to Teaching School structures.

## School Business Director (SBD)/Primary Partnership (PP) participant case study: Diane Houghton, Blyth, Northumberland

This case study is drawn together from a series of (longitudinal) interviews with Diane, and selected colleagues, in January 2011, November 2011 and December 2012. It represents their experiences over two and half years from joining the first SBD cohort, and includes the initial (baseline) mid-programme interview, the post-graduation follow up interview seven months after completion, and the concluding interview. The baseline interview involved direct interviews with the SBD participant, and the (then) headteacher and deputy. The first follow-up discussion, and concluding interview both involved semi-structured telephone interviews with Diane. All interview reports and this final case study have been verified with Diane.

### **Summary: The SBD Programme**

- Diane's development in a new role to the early school partnerships...has been directly supported by the SBD programme and subsequently by continuing interaction with contemporary participants.
- Diane felt initially encouraged by the programme content and did not have problems with the pace or intensity of the programme, although was aware others did. She felt that her past teaching and higher education experience set herself up well for the demands of the programme.
- Aspects of SBD which were seen as especially good included the integration of face-to-face session and group work, research skills.
- Diane especially valued the blended approach, scenario-based group work, and reciprocal visits. After a poor start and change of tutor, she found the coaching support a highlight of the programme.
- She was soon aware of very early benefits for her job role and self-improvement including for her understanding of systems leadership and has continued to benefit from the confidence she gained especially in dealing across schools on wider policy issues and on building partnerships systems and capacities.

## 1. Participant and school background information

Croftway Schools Primary Partnership: key facts

Location: Croftway School is in Blyth, Northumberland

Scope: Community Primary School

Age range: 3-10 years

Size: 489 pupils

Other information: Croftway was designated (June 2013) as a 'Converter Academy' and with Malvin's Road Primary and Morpeth Road Primary forms The Blyth QuaysTrust.

School and business management context: On joining the SBD programme, Diane was the HR and Operations Manager of Blyth Community College where she provided support to the College and also to the Blyth Schools Partnership of schools. The partnership included the Community College and also Newsham Primary School, Malvins Close Primary School, Morpeth Road Primary School and Croftway Primary School. She was based for most of the following two and half years at the College for three days a week with a half a day a week at each of the partnership schools, subsequently moving to be based Croftway Primary as Director of Operations of an Academy Converter Trust based on three of those schools.

The origins of the post and the earlier Blyth Schools Partnership were that Blyth Community College was a large secondary school (community college) supporting the surrounding area, a socio-economically disadvantaged catchment with the proportion of pupils on free school meals well above the national average. Previously (until 2010) it was a high school for 13-19 year old students. Following restructuring of local education the College became an 11-19 provider, combining a secondary school (of 1,200 pupils) and also a sixth form of 240 students.

Blyth Community College (as was) had a challenging history centred on raising standards of achievement which remains below the national average at a third of 16 year olds achieving five or more GCSEs including English and mathematics at A-C grade. Its 2008 Ofsted grade (2008) of 'satisfactory' was downgraded in 2011 and the College was placed under special measures with a notice to improve. This situation has had a significant influence on the wider school partnership, and contributed to the decision making process of three of the primary schools looking to

multi-academy trust status and seeking a dedicated Director of Operations. The post was advertised early in 2013 and Diane was appointed, moving to her new post at Easter based at Croftway School.

In 2009, when she joined the earlier Blyth Schools Partnership, all of these schools were in transition as part of the reorganisation of schools from a three tier to two tier education system which was in place by September 2010. Although not formally federated, all of the Headteachers and Governors of the partnership schools had committed themselves to the concept of The Blyth Schools Partnership which, through partnership working and collaboration, aimed to meet the collective and individual school aspirations for the children and the community of Blyth as a whole. The partnership was then seen as an early stage of establishing an operating framework and culture, and an early outcome was the establishment of terms of reference for the group and the agreement for joint support through Diane's post.

A qualified teacher, she had an early career in school teaching, before moving to a teaching and management role in a General College of Further Education, later moving to a schools advisory role in the Northumberland County Council. In this she worked closely with local schools for seven years at mainly Headteacher and governor level, and specialised in human resources, governor and finance matters. This combination of past experience as practitioner and management advisor was thought to: '...help massively' with her role as HR and Operations Manager in the partnership. Throughout this period, and her tenure at Blyth College, she was a member of the seven-person SMT for Blyth College. Diane's contract was held by the secondary school but a legally constituted memorandum of understanding had been drawn up to protect each schools independence and financial position. Interviewed Headteachers acknowledged that a:

...substantial amount of work and research was done to ensure that the post would fit equitably within the SLTs of each of the schools.

The role with the schools partnership had a job description, was linked to LA grading structures and had specific objectives which shared many of the key responsibilities and competencies of the SBM programme. It was expected that the role would evolve and change according to need, and would also provide a strategic lead for the partnership within a system leadership model.

For much of the case study period, this role remained unchanged but has since adapted to largely external circumstances. A starting point for this was a 2011 Development Day - which was led for the partnership by Diane to consider the strategic positioning of the partnership in the 'changing policy landscape', and which started an early cross-partnership debate and focus on academy conversion. The strategic focus was then described as:

Every school is considering it (academy conversion)...like it or not we have no choice but to consider it.

Wider links with NCTL: Diane has no previous experience of the SBM programme. At the time of joining the early partnership, Blyth Community College had very limited past experience of the NCTL programme. Subsequently, and with Diane's support, two of the primary school partners have completed the CSBM programme, and she has also contributed to reviewing programme content.

## 2. Opinion of the SBD programme

**SBD expectations of participant:** The decision to join the SBD pilot was led by Diane rather than any specific strategic thrust from Blyth College or the partnership schools. This had diverse roots. Early in 2010, and shortly after joining the college, Diane attended the National SBM Conference and discussed the A/DSBM programme with the NCTL desk at that event, but reflecting her wider experience she was encouraged to apply for the planned SBD pilot. Although missing the first cohort applications she applied for the second and through Accreditation of Prior Learning, which she saw as a rigorous process, was accepted.

Her application had the support of all five partnership school headteachers and the respective chairs of governors. In this, the main synergies between the decision to participate and school developments was in building capabilities to inform how the role of the HR & Operations Manager could contribute to shaping the partnership. In particular Diane felt that by completing the SBD programme she would have a managing framework for shaping and leading within the schools partnership:

I was new to post and could see a lot needing doing...I saw the course as a scaffold for how to do it all, and providing a sense of direction to help evolve own focus and job description.

She also felt the need for stronger leadership skills to help her develop as a systems leader and for facilitating collaboration to improve schools performance - collectively and individually. She also thought SBD would help in:

...thinking conceptually (and) creatively and to identify new and improved ways of operating and overcoming barriers.

Her expectations were shared by headteachers in the partnership, although in general there was felt to be a: '...stronger case for the merits of SBD as personal CPD'.

**Synergies with career development:** Her motive for joining consequently combined aspirations for personal professional development with a strategic focus for partnership systems, leadership and improvement capabilities. One specific expectation was that SBD would help her review and move on the ‘...rather loose’ job description by taking account of current best practice in particular of systems leadership. Two and half years later she felt that these aspirations were well placed.

### 3. Content and added value of SBD

**Programme value:** On starting the programme, Diane had some early cautions about the value of the programme for her, especially from the assessment module, she was also concerned that joining SBD so early in her school and partnership role was:

possibly premature...my role was in its infancy, and she had no previous apparently ‘typical’ school business management experience.

However, by mid programme she was re-assured about the decision and confident about the content which she felt had: ‘...played to all my strengths and needs’, *and* felt the pace to early 2011 had been relatively measured. She expected the intensity of the programme to pick up in the final modules with demands being more back-end loaded. In the event she felt the first phase had prepared her well for the second, and she felt the blended approach had worked well in helping her balance the demands of the programme with her day job.

She graduated in October 2011 with her concluding modules graded as ‘excellent’ which she took to be a good reward for the effort she had put in both with the content and also juggling the demands of the programme with her evolving job and wider role. On graduation she was asked by NCTL managers to review the proposed content of the modified SBD programme, and in particular new modules relating to academy conversion and project management - one of just five SBD graduates asked to do this. She was also asked to speak about her experiences of the programme and its early use to the new (2011-2102) SBD cohort.

Looking back on the programme, she felt a lot had been made on recruitment and early in the course about plans for ‘co-construction’ of the refined programme. In the event, and during the course, she did feel that much had been of those opportunities although she suspected there may have been a heavier emphasis on this in the first cohort for the SBD pilot.

**Programme design and delivery:** On graduation, and since, she has continued to feel the content and design of the programme was generally well thought through and responsive to school needs - ‘...nothing was a waste of time’. The face-to-face

events were seen as varied, and a highlight of participation, and she felt these were appropriately intensive to make best use of the limited contact time within a blended programme. On other strengths of the programme, she felt that the opportunities made for group working had been of particular added-value and the scenario based tasks were seen as especially useful in ‘...getting to solutions really quickly’. Diane also greatly valued the reciprocal visits.

Her experiences of programme coaches were mixed, and not initially positive having some early difficulties with access to and support of the allocated coach. However, these issues were explored with the College and on changing the individuals allocated she came to value the coaching arrangements greatly:

They are brilliant...I could not speak too highly of them...(they are) supportive and challenging but in a wholly positive way...consistently pointing me in the right direction and always available.

One particular aspect of the added value which Diane felt was emerging as significant in her post-graduation year - and subsequently, was the informal support between participants. Group work and informal email interactions on the programme saw a social network of six SBD's emerging by the end of the programme, and who have continued to be an informal source of support and expertise. These have been a real asset to Diane in her role, and a ready source of people she knows and trusts and where:

You can bounce things off one another without feeling a fool...‘I need a risk assessment for... any ideas’, and it's really supportive.

In the first year after graduation this became an important source for sharing problems and challenges and for ideas and solution building. This tended to be centred on the generic development issues. The group was spread out geographically with SBDs mostly around or north of the M62. Diane also felt this group was mutually supportive, with interaction after the programme making a difference to other school contexts. For example, through the group she arranged a one-day study visit in autumn term of 2011 for a partnership manager in the Eastern region, which had an important contribution to developing a partnership framework for these other schools. The group has continued to provide informal support and also meets (socially) once or twice a year to re-enforce these links.

**Programme improvements:** Although very positive about the programme - during and after participation, Diane also felt there were some relative weaknesses and in particular:



- Early assignments would be aided if it was possible to put in drafts for preliminary feedback. She understands that arrangements for were later put in place but it was felt these could have been anticipated earlier.
- Delays to tutors uploading resources and materials were commonplace and felt to be unnecessary and not explained. For a blended programme this was a significant constraint, and acted to compress development and preparation time, which she felt acutely affected those participants faced with job role, domestic challenges or other issues of managing the workload.
- There were what were described as: ‘...teething troubles’ on some aspects of programme organisation and in particular changing delivery deadlines, and adequate signposting to resources.

Diane saw few content gaps across the programme, but against a background of rising demands on school business managers on financial management, and especially when considering academisation, it was felt that more content on financial management would have been helpful. Her only major - concern had been with cohort 2 start-up arrangements and the allocated first learning coach.

In this, she had expected direct feedback from the first face-to-face session - the development event, and in particular to the assessment relating to her professional development plan (PDP). It subsequently emerged that other groups in the cohort on the same (second) day did receive feedback but three did not - an issue seen to centre on a specific learning coach. This caused initial confusion about her participation and subsequently a complaint led to allocation of a second coach. The second coach was seen as excellent in all respects, as indicated above.

The main challenges of the programme were seen as time constraints. This centred on the demands of balancing different priorities between the programme and her day job. It was felt that there were no short cuts to putting in a lot of energy and effort to a very intensive and demanding programme, which needed:

...a lot of time, reflection and processing of the concepts...and keeping your head above water.

**Programme overview:** Diane describes herself as an enthusiast for SBD and in particular for its use in executive management of school partnerships. An important outcome for her has been in the combination of enhanced skills and confidence to make (and take) strategic judgements. She has become confident in being prepared to look at national policy and to articulate consequences of policy changes and pressures to school contexts - as well as to determine implications and needs.

She also felt the systems leadership emphasis was important and well placed and has encouraged and helped her to work with Headteachers in ‘look outside the box

of how to tackle changes and opportunities'. It has also provided her with a framework to better place and understand different leadership styles of different school Headteachers, and this has contributed to overcoming rigidities and resistance to change. Overall she describes the programme as:

Excellent in all respects...providing a framework and scaffold for managing transformation in schools.

## 4. Impact

**Impacts achieved:** Diane saw very early gains from participating in the programme - for herself and the partnership. By mid programme, she was already reporting that the learning on systems leadership was already having an impact of the development of the schools partnership. This was endorsed by headteachers interviewed at the time who commented that she was shaping an approach to partnership support and leadership which related well to partnership needs in communities of learning.

At the same time, Diane herself noted that every time she returned from a face-to-face event, or from a WebEx session or placement, she was doing something in her job differently either in practice or in applying the concepts she had learned to her review and thinking. As an illustration she added she had adapted an early framework put in place for cross-partnership project management:

An early (partnership) priority has been some coherence on project management...I thought I had cracked it...but (SBD) showed me I had not.

After graduation, the impacts have been faster for her personal development and use of new skills slower and more progressive for the partnership and schools. Consequently, by mid programme and since she felt the practice of using reflective practice was already embedded in how she worked and remains an important facet of her management style which she saw as especially important when working across different schools.

In the early partnership, one of the first key challenges to the post-holder has been in providing direction across the early partnership, and leading the schools in finding innovative approaches for achieving best value together. In advance of any hard federation in these arrangements this needed to be carefully and sensitively balanced so that each school could ensure it was able to maintain its own secure financial position. Without the structures provided by a direct federation, or trust status, this was thought likely to emphasise co-operative arrangements (and facilitation of them) in, for example, pool budgets, procure from different budgets and to do this across different schools' operational systems.

Importing ideas and concepts from SBD consequently proved to be a progressive impact. A year on from graduation, changes emerging from SBD related thinking and learning had impacted on cross-school systems and cohesion on, for example:

Integrated performance management for support staff and alignment of grades and roles across the partnership. Action across the schools in these areas meant that some had been able to progress more rapidly than if they had attempted such improvements on their own.

Much improved partnerships systems for safeguarding, children admissions and transition management and to other strategic aims.

Introducing and resourcing a cross-school CPD programme for middle leaders and supervisors in non-teaching staff. This included over 30 people - variously ICT managers, other SBMs, HLTA's who were managing TA's, and others. Many had been recruited to these roles had no professional training, and Diane, working with school Headteachers designed and developed, and co-led, a themed CPD programme including team management, managing difficult staff; leading effective teams, managing appraisals - all resourced through collective school partnership funds.

Beyond specific 'systems' improvements, a wider post-graduation challenge has been in working across the partnership to establish the relationships necessary to foster true partnership working, responding to but not becoming lost in individual schools' operational issues. Diane had felt that success in this would help to raise further the partnership's local professional profile and with the prospect also of contributing to the development of school business management regionally and nationally. In this the programme has provided for more substantial early impact with stronger leadership skills for Diane herself, and the confidence to apply these in different school contexts:

I have moved from being a once a week visitor to schools and sticking things together to hold up for a bit longer...to building collaborations and sustained partnership capacity.

She has gone on to develop a cross-partnership strategic forum represented through a regular meeting of partnership Headteachers, which is chaired by Diane, and which has subsequently put in place a cross-partnership Action Plan for its development. By late in 2011 she was able to reflect that systems leadership was a feature of the early schools partnership: '...at the heart of what we do and how myself and the heads are doing'.

**Sustainability of impacts:** By the end of 2011, much had been achieved in the early partnership, and much of this led and shaped through Diane experience of the

SBD programme, there were tangible improvement to school systems, staff development and a culture of embedded systems leadership. However, there were development needed to build resilience in those arrangements (eg succession planning) and at that time Diane was worried about the prospects for deepening the collaborations and further partnership development. She was concerned in particular about latent tensions between schools on if and when individual schools were to choose to go down the academy route. It was felt that unless they could do this collectively - which was improbable with only half the schools graded 'Good', this would introduce tensions and competition in the collaboration in particular for schools admissions.

These concerns proved to be prophetic. Early in 2011-2012 Diane organised a strategic review day which focused on the changing landscape of education, pressures on school (and partnership) leadership, new management demands styles, and policy changes. She had wanted to explore issues of academisation in this but some schools - and notably Blyth Community College, where she was then based, were reluctant - partly because their governing body had already made it clear they were not in favour of the academy route. Subsequent discussions with individual governing bodies of member schools did cover the issue, and all but one of the Primary Schools set up individual Working Parties, and where Diane in her partnership role supported discussions including presentations to staff groups.

Subsequently, and with rising pressures post inspection on Blyth College, and internal tensions the earlier partnership arrangements have changed, and narrowed. In the event, and with external consultant support, three Primaries in the (now) converter academy cluster decided to pursue this route as a single trust - and this is where Diane now focus her activities as Director of Operations.

The partnership developments across the six schools have consequently not proven durable, largely under evolving circumstances following poor inspection ratings for some member schools and the consequent challenges of special measures, and partly as members have taken different strategic options in respect of what proved a divisive issue in academisation.

**Further impact and challenges:** Diane has planned to take advantage of the opportunity to progress to a Masters award by using past and prospective SBD credits. However, the changes within the partnership arrangements, the change of job and focus and her contribution to the academy conversion activities of the new Trust have taken priority, and are likely to do for some time. Overall, however, she feels that although a niche' qualification of itself, the programme has provided a solid foundation and that the value of SBD was especially relevant to a role working outside a 'home' institution, and:

For schools which have or are developing strategic collaborations, and are serious about these, it (SBD) is a must.

Since graduation, Diane has also applied for and been granted specialist leader in education (SLE) status - one of the very first SBM/SBDs to achieve this status. At the time of writing she has yet to have the opportunity to apply these skills outside her current partnership schools.

# School Business Director (SBD)/Primary Partnership (PP) participant case study: Kerry Snell, St Boniface Roman Catholic College

**Kerry Snell** began the SBD programme in September 2010

This integrated case study report is based upon the two follow-up telephone interviews in March 2012 and March 2013 with the participant. On both occasions she was working at St. Boniface Roman Catholic College, which she joined in January 2012.

The case study also draws from the initial face-to-face interviews in January 2011 conducted with the participant and with the headteacher in her previous school Coombe Pafford School, Torbay.

## **Summary: The SBD Programme**

- The SBD programme was the final stage for the participant of completing all four stages of the SBM/D suite of programmes. She was in a pilot cohort for both ADSBM and SBD. In commenting on the time she started out on the CSBM she felt that: 'My life changed from that moment...it all snowballed completely'.
- During the SBD programme, Kerry's personal journey coincided with her changing jobs on two occasions. She actively sought out a position, which would allow her to take a more strategic role and to play a more important part within the senior leadership team. Kerry had sought a job that enabled her to make better use of her increased awareness of the strategic role she could play as a school business manager. This awareness came through the SBD programme.
- Her personal leadership style is linked to her people skills and the SBD work on Emotional Intelligence helped to strengthen this natural style. The SBD has led to greater confidence when there is a need to be more direct with colleagues.
- Although having felt the need to undertake further accountancy training because of a possible gap in SBM/D provision, Kerry commented at the end of the four programmes that:

I know how education works...you don't get that if you just do accountancy. Being an accountant doesn't give you the other skills I gained from [NCTL] programmes.

- Identified strengths of the programme were the face-to-face sessions, the networking, the ability to personalise her journey and the quality of the people involved, ie the tutors.
- Real added value came in the way that the SBD programme had made Kerry better at her current job. The research elements involving critical reading and critical thinking helped her to become a better practitioner. Her Headteacher had stated that:

If you want someone with clarity and who will think problems through in a logical way, then you need Kerry (on the project board).

## 1. Participant and school background information

### **St Boniface's Roman Catholic College, Plymouth: Key facts**

Location: St Boniface's Roman Catholic College (SBCC), Plymouth, Devon

Scope: Voluntary Aided Comprehensive Secondary School (Boys) with Sixth Form (Mixed)

Age range: 11-18 years

Size: Approximately 800 pupils on roll with approximately 130 in Sixth Form

Note: Recent (June 2013) Ofsted inspection recorded a grade 4 ('inadequate').

Kerry Snell had experience of all 3 levels of the SBM (Cert/Dip Adv Dip) before beginning the SBD programme. In January 2005, during the 12 years that Kerry was working as a part-time administrator in a local primary school, the new Acting Head there on her first day in the school called Kerry into her office to say:

I've read this article about the CSBM...you should do it. It's exactly what you should be doing. You are more capable than your current role (requires).

However at the time, because of the many changes in her personal circumstances Kerry had little confidence in her own ability to take on the programme. The spur to do so came from her interest in children's education. She definitely had a passion for education, for improving the lives of our young children. She decided that there was no harm in applying and got onto the next cohort which started the CSBM in November 2005.

My life changed from that moment ... it all snowballed completely.

At the time of the first interview Kerry was employed at Combe Pafford School, Torbay, but since 16 January 2012 she has had the post of School Business Manager at St Boniface's Roman Catholic College (SBCC), an all-boys secondary school with a mixed Sixth Form. The Ofsted inspection in October 2011 had reported that the school was good both for overall effectiveness and for its capacity for sustained improvement. However the most recent Ofsted inspection was in June 2013. This resulted in an overall judgement of inadequate (grade 4). Ofsted reported that:

in order to improve the College needs to:

- Improve the quality of teaching so that all students make good or better progress.
- Raise students' attainment in English.
- Improve the support for disabled students and those with special educational needs.
- Further improve the impact of leaders and governors

The headteacher during Kerry's participation in the SBD had joined the college in April 2009 and in Kerry's view there have been huge changes while he was in post. There had been a financial deficit to deal with initially. Since then there had been significant staff changes especially through voluntary redundancies in the English Department. That headteacher left the school in June 2013 and the former deputy has now been appointed acting head for 12 months.

Kerry is part of the senior leadership team at SBCC and part of the management arrangements for the consultation of 5 secondary schools in Plymouth. This consortium was formed to provide the programme of Sixth Form study in the area. The group of Business Managers works out the practicalities of this arrangement; eg travel for students between schools and the necessary payments that follow. The business managers share informally other aspects of their roles.

The college is now looking at the potential benefits of forming a multi-academy trust of 36 schools. The Diocese of Plymouth created a project board for this initiative in January 2013 and Kerry is a member of the board.

Kerry has completed levels 2 and 3 of the AAT (Association of Accounting Technicians) Award and started level 4 in April 2013. She is also doing the NCTL programme on conversion to academies and financial reporting. Within the management team one person at SBCC is on the NCTL specialist leader of education (SLE) programme, while the finance officer and the human resources (HR) officer have recently started the CSBM together. 'They have done this as a direct



result of my encouragement as I see them to have the potential to become business managers of the future’.

In her previous post Kerry had become aware that the job did not meet her expectations in that there was little opportunity to use the learning gained from the SBM programmes or more recently from the SBD programme. When interviewed in March 2012, she felt that her role there had not been sufficiently strategic to meet her expectations and had been unlikely to change in the foreseeable future.

While at Combe Pafford, Kerry started studying for accountancy qualifications, partly as her head there had felt that this was a gap in the SBM suite of programmes. Kerry also felt that accountancy was missing from her CV. All the SBM/D programmes have contained elements related to finance, but these had been less about the technical side of the subject. Kerry was able to see the benefits of accountancy at a strategic level, but through her accountancy course was developing an appreciation of the technical side of finance. This helps her for example to make sense of the impact of data entry, to see the big picture. Her study also helped her when working with accountants within the local authority.

When interviewed in March 2012, having been in post at St Boniface Catholic College (SBCC) for only nine weeks, she had become aware that her current post was concerned with school business management and required an SBM rather than an accountant or bursar. The school (SBCC) had already involved her with the SLT and at governors meetings her opinion was being sought. She was therefore already working in a more strategic manner than had been the case in her previous role. This was a significant change and represented exactly what Kerry wanted to be doing. Kerry had sought a job that enabled her to make better use of her increased awareness of the strategic role she could play as a school business manager. This awareness came through the SBD programme.

## **2. Opinion of the SBD programme**

One important connection between her current role at SBCC and her previous participation in the SBD was the change required that she needed to learn more about leadership. This was one of the areas she had felt held back on in her previous role in Torbay. From the SBD programme she had learnt about leadership styles and how to develop her own style. In her current role at SBCC she has a very significant leadership role both within the College and across groups of schools. The SBD programme had helped her to look at leadership and policy in a deeper way. This has proved invaluable at a time of major change; for instance in the developments related to the multi-academy trust.

Her personal leadership style is linked to her people skills and the SBD work on Emotional Intelligence helped to strengthen this natural style. The SBD has led to greater confidence when there is a need to be more direct with colleagues; for example this can occur when the needs of the College as a whole have to override individual concerns. In personality tests conducted within the SBD programme she would tend to get even scores across the board suggesting a sound balance between differing aspects of personality.

In her counseling role she has been helping a newly appointed assistant headteacher (AHT), a young and excellent teacher with plenty of new ideas. He has found some difficulty and has encountered problems with some more experienced members of staff on occasions. He has come to Kerry for advice and support because he trusts her judgment. Kerry has enjoyed this and it has also helped to develop her coaching skills. The AHT has expressed his appreciation of this support and Kerry also feels it is a two-way thing - she benefits from his experience as an excellent teacher. Together they can develop their understanding of why effective leadership in schools is so important.

She has also become good at reflecting on leadership, at understanding theory in personal terms and using differing leadership styles in her work at the College.

The SBD programme has led Kerry to a broad understanding of education; an example of this being the importance of data related to pupil achievement attainment and progress. The Senior Leadership at the College recognised this breadth of understanding. The Headteacher at a whole staff meeting recently commented that the College has been through radical change. He felt that the introduction of proper business management with clear processes has supported the change. He went on to state that Kerry's appointment had been a dynamic part of this change process. He also commented subsequently that Kerry's qualifications had helped her to stand out from other candidates; they wanted someone who was not just a finance person. They wanted someone who understood business management and education in particular. They identified that she had sound leadership skills which Kerry thinks is as a direct result of the SBD programme.

In considering the place for finance/accountancy within the SBM/D programmes, she commented in 2012 that:

I don't think I would have changed what I did if I had my time again. I would still have completed the suite of SBM programmes up to and including the SBD because it has given me what I need to do my job. It may be that accountancy is best offered as stand-alone provision. Accountancy may be needed by SBMs working in particular circumstances (such as academies).

Having completed the [NCTL] programmes, I know how education works...you don't get that if you just do accountancy. Being an accountant doesn't give you the other skills I gained from [NCTL] programmes.

She found the SBD programme required her to be self-reflective, more so than with the earlier SBM programmes. She had greater choice in her projects and found the SBD to be much more personalised than the earlier programmes within the scope that they expected you to cover. A particular focus she found very beneficial was her research into leadership and emotional intelligence. She was helped to develop her own leadership style through this research. She also reflected on the leadership of others in her teams (SLT for example) and was able to identify the styles of her colleagues, recognising effective working relationships between colleagues.

The SBD programme was well structured, yet Kerry found that she was often completing assignments at the eleventh hour. She felt that this was largely due to the pressure of other commitments on her time rather than programme design.

Both the topics and the delivery were good. The networking was excellent and she welcomed the chance to work with like-minded people working at her own level, doing the job she was doing. She felt challenged by the programme by working with people operating at her level. However this helped her to recognize her strengths, the level she was working at and the progress she had made over the last few years.

In terms of self-reflection Kerry became aware that at times she could be very self-critical and now is more able to listen to criticism constructively.

The early 360° evaluation was useful and she recognised that she spent too long on the development points rather than the positive aspects. She feels able to take criticism and to realise what she does need to do to improve. 'Self-criticism is good but you need to be able to use it productively'. One of the very good things about the programme had been the quality of her personal coach. It was the coach, who helped her to look at the 360° evaluation, to realise why people had said what they had and view that positively. Kerry no longer feels threatened, when people suggest that things could be done differently.

At her previous school many of the task-driven jobs remained hers to complete. Kerry now recognises that delegation allows for growth in the team and at SBCC many of the less strategic jobs are now assigned to colleagues. Effective delegation thus allows Kerry to nurture her team. A large part of this awareness of the value of delegation came from the SBD programme.

Kerry's expectations of the SBD programme haven't changed significantly since she was first interviewed in January 2011. She did consider having a break from continuing study, having been studying since 2007 on the DSBM and ADSBM. At

the time of completing the ADSBM she had felt 'never again', but her family recognised her 'bug for studying' and persuaded her to take the SBD programme. Kerry was actively encouraged by the College to apply for the SBD programme once it went 'live'. She had not done A levels and had not taken a degree, so having got to a degree level work with ADSBM it was tempting to say no to studying at Masters level on the SBD programme. In the end Kerry particularly liked the way in which she felt the SBD programme could be personalised in that it could be 'finely tuned to what she wanted to get out of it'. This was a big attraction for her. It was also the fourth of four and it was difficult to walk away having done three.

Kerry's successful completion of the four programmes might not have happened however without support at a key stage on the CSBM. At the end of the first day's sessions Kerry went to her tutor and said: 'I can't do this...I want to go home. I'm only an assistant, I don't know anything about school finance, about risk,...I can't do e-mail,...can I post assignments to you?' Her tutor's response at that early stage was influential.

My tutor encouraged me to stay and said that part of her role was to nurture me, to allow me to develop, recognising my own strengths. She was pivotal in my success and with her guidance I soon changed how I felt at first, literally flying through the assignments. She later told me I then became the glue that held the rest of the group together, with me encouraging them when they felt unsure. It was at this stage she asked me to become a tutor once I had completed the course, which I did and still do to this day.

In 2011 soon after the start of her SBD programme, Kerry commented that feedback was helpful and informative, honest and as she expected. Kerry had had a good idea of the level of her work for this first assignment, having had some personal and professional pressures on her time when it was being completed. This aspect of the SBD programme was seen as a challenge for Kerry; the ADSBM was the first opportunity she has had to write academically, linking in academic theory from the literature. The first feedback for the SBD concerned the need to link in theory by the use of several viewpoints and the need to summarise these and make it clear what your view was having read the arguments. She felt she didn't say enough about the value of the research from which she had quoted.

I didn't use the 'so what'...I found the feedback 100% accurate and I was pleased to pass the module. I have been given useful and usable feedback to put into my next piece of work.

Early strengths of the programme were the face-to-face sessions, the networking, the ability to personalise her journey and the quality of the people involved, ie the tutors. By way of contrast there had been a 'not so good' experience at ADSBM.

Because of her wider involvement with NCTL as facilitator and advocate Kerry knew whom to contact when she faced problems on ADSBM. This reinforced her view of the high quality of the current people delivering SBD. They were regarded as being excellent.

### **What might have been improved?**

Relative weaknesses are more accurately described in terms of making the programme even better. It was evident that some participants had dropped out early and some were frustrated over delays in materials or information. Kerry felt that as a pilot programme some of the thrill was helping to produce the programme as it progressed. However work placement turned out to be a downside of the programme.

The SBD placement was hard to arrange and didn't work at all well for Kerry. It was however a pilot programme and the participants had some influence over the development of the programme for the next cohort. Kerry spoke about how the placement could have been arranged in a slightly different way and this was taken on board in the feedback. Kerry was aware that she wasn't the only one who had problems with the placement but her location made getting to other participants' schools much harder.

Additionally some materials for the SBD programme came out later than might have been anticipated. However as Kerry was often completing work close to the deadline, this wasn't as great an issue for her. She was also aware that this cohort was part of a pilot programme and that is to be expected as materials were being developed as the pilot progressed. She had also been on the pilot ADSBM programme in relation to which she commented:

With a pilot you have to be very open-minded, dealing with new thought processes, new material...things can change. I felt very privileged to be (on the pilot) because you are at the cutting edge of what is being prepared for future business managers.

## **3. Content and added value of SBD**

The SBD had provided Kerry with a personal learning journey, which had enabled her to go where she wanted to go. There were issues with some elements (eg the placement) but overall she got what she wanted from the programme. She felt the blended approach to delivery to be a brilliant way of working.

As a facilitator/tutor for the College she passes on her views to the participants. Having been through the SBM process, she is now a tutor assessing others' work.

The feedback/assessment of her work led to a gradual improvement in its quality. Her final module submission thereby gained the best marks from her cohort. A real strength of the programme was the way in which it was possible to create a personal learning journey within a clear framework or structure. Kerry identified challenges that were evident at an early stage in the SBD programme. These focused for her on the time required for travel and study. The level of the work was also demanding especially in the early stages.

Real added value came in the way that the SBD programme had made Kerry better at her current job; a job she gained after completing the programme. The research elements involving critical reading and critical thinking helped her to become a better practitioner. This was recognised by her current Headteacher at the development of the academies project. He stated at the time that: 'If you want someone with clarity and who will think problems through in a logical way, then you need Kerry on the project board'. Kerry puts these very supportive views down to the research, critical reading and thinking within the SBD.

#### **4. Impact**

The impact of the SBD and the other programmes was essentially on Kerry herself. The four programmes all 'stepped into each other. 'It's been a cumulative impact,...a journey and it's very difficult to separate things out' (in terms of cause and effect). In her first interview she commented that: 'The College as a whole have played a vital part in my development. As far as SBD is concerned, it's like the cherry on the icing of the cake to finish producing me, the School Business Manager'.

When first interviewed in 2011, Kerry recognised this difficulty in separating SBD from what has gone before in the three SBM programmes. However one early opportunity in the SBD programme was the chance at the face-to-face events to work through scenarios and problem solve with a group of like-minded professionals. They were given a task to create a presentation concerning a problem in a school. The group were given information such as the last Ofsted report and the Raise-online data. This group task had an impact on her ability to understand her own school more fully and therefore to do her own job more effectively. What happened at the face-to-face event gave her insight into what others in different settings might do and recognition of the validity of her own contribution to discussion.

'I've learnt to view myself as a professional who does know what she's taking about'.

She commented in March 2013 as follows:

I've definitely got more confidence. Since I started CSBM back in 2005, my life has completely changed. I've (now) got the job that I love. I'm told by my colleagues that I've made a significant difference to the College in the twelve months that I've been here. I'm a completely different person from the one began the journey in 2005. I am also regularly told that I am inspirational to others and this is evident in the fact that two of my team are now doing CSBM, something they never thought possible.

The SBD has given her the chance to view issues in a very different way as reflected by her move from the management of a school to a leadership role in partnership with other schools. In looking forward her role has changed and will be changed further with the multi-academy trust. There are lots of small schools involved and many of the administrators involved have had a more traditional limited role. They are therefore concerned about the forthcoming changes. More experienced SBMs or School Business Directors as they may be called will be able to support the smaller schools. The potential academy trust represents a significant change. As part of the project board for the academy conversion, I am involved at a high level in the structure. I have been asked to comment on potential financial and HR structures within the academy trust and attend regular meetings. The leadership is distributed, as it is within the college as well. This enables change to be more effective and take with you those who are reluctant.

Because of our latest Ofsted we will now be a sponsored academy, within the academy trust. This will happen relatively quickly and will need high level strategic input from me, advising on processes as we move into another phase. I am integral to the SLT driving this change through and whilst I have always felt part of SLT, I believe I am truly seen as a leader within the school. Such that the governors are putting forward for me to become an AHT equivalent (although my title will be Director). This change has yet to happen but should be by the New Year. This to me is clear evidence of the impact of SBD and the significant development in my leadership qualities. The Acting Headteacher recently commented that the college has come a long way since I joined and I am worth my weight in gold!

Kerry has enjoyed being part of the (HOST) evaluation and on a personal level she is proud of the way in which her studies have the potential to inspire her own daughters.

## School Business Director (SBD)/Primary Partnership (PP) participant case study: Lynn Young, Smestow School, Wolverhampton

Lynn Young began the SBD programme in September 2010.

This integrated case study report is based upon a set of initial face-to-face interviews in January 2011 conducted with the participant, her Headteacher and two colleagues; it draws also upon two follow-up telephone interviews in March 2012 and March 2013 with Lynn. On all occasions she was working at Smestow School, Wolverhampton.

### Summary: The SBD Programme

- Lynn Young had completed all three levels of the SBM (Certificate/Diploma/ Advanced Diploma) before beginning the SBD programme and had previously gained a degree in Business Studies.
- She had been a member of the Senior Leadership team at the school since 2001. However colleagues commented in 2011 that: 'she is now more confident in talking about teaching and learning...and contributes more in our meetings to these aspects of the role. (The SBD programme) has given her more knowledge and confidence. She's seen as an integral part of the SLT seeing how the whole thing merges together'.
- A number of the elements of the SBD programme came to fruition after the programme had been completed. Lynn's role now (2013) involves her in being totally responsible for the 'Building Schools for the Future' rebuilding project. Lynn is the first point of contact with the project team. She had previously completed a study of BSF within the SBD programme. She is therefore clearly able to see the benefits of what she learnt on the programme; 'It's so useful now!'.
- She remains active within the local community of school business managers being Chair of the Wolverhampton Association of School Business Managers.
- Lynn was able to personalise her SBD programme while studying but feels that this has become important after the programme. 'This was one of the best things about the programme. You should personalise not only to yourself but to your school's circumstances. The SBD programme in particular was highly relevant in the light of all the changes that have been happening in government (policy) now.'



- Lynn feels that: 'The whole suite of SBM/D programmes was long overdue and the way it has been done is the best it could be...I really loved the course. I thought I achieved an awful lot as it stretched me out of my comfort zone'.
- Added value comes from the fact that the content from the programme is always there to look back on. Lynn explained that: 'A couple of months back I thought of an activity on teamwork, concerning peoples' roles within a team. From my notes I was able to give that information to the team who

## 1. Participant and school background information

Lynn Young had completed all three levels of the SBM (Certificate/Diploma/Advanced Diploma) before beginning the SBD programme. During the other programmes she was mentored by the headteacher, and was mentored informally by two other senior colleagues at the start of the SBD programme.

Lynn had gained a Degree in Business Studies prior to going into school administration. Initially a resources technician, she was running the resources department at her previous school when staff were told that the school was due for closure in two years time. She had started an HNC in Business and Finance and was interviewed to become a senior administrator in her Smestow School. Once that appointment had been confirmed and the HNC had been passed, she went on to complete her degree in Business Studies over two years part-time. The degree was through Staffordshire University but was completed at a local college. Initially her role involved an oversight of personnel, finance and site matters. The degree had given her a greater knowledge of what was going on elsewhere outside the world of education.

When the headteacher came to the school as Headteacher in January 2001, had changed her job title to School Business Manager and promoted her onto the Senior Leadership Team (SLT). She has therefore had a growing strategic role on SLT for several years and been fully involved in the core business of the school (teaching and learning) prior to starting on the SBD programme. Her role has changed since 2001 and is now much more strategic than operational. Her main responsibilities when first interviewed in 2011 were the support staff and the business services the school operates.

Lynn has therefore been in the same post as School Business Manager at Smestow School, Wolverhampton throughout the evaluation. The school is formally known as Smestow School, A Sports College but the school may well decide to remove the 'Sports College' from this title because there is no longer a requirement to have a specialism. The School was due to be inspected by Ofsted last year (2012) but because the school had been recorded as 'Good' at the last inspection and examination results are on an upward trend. Ofsted were expected at some stage before July 2013. The school was in fact inspected in June 2013 and achieved a grade of 2 (Good) for all aspects: achievement of pupils, quality of teaching, behaviour and safety of pupils, leadership and management. In commenting on leadership and management the latest 2013 report states that:

Senior leaders know the school well. They are determined to improve the school to become outstanding. Departments are spotlighted for review by senior leaders when information about pupils progress indicates any concerns. As a result, school leaders have an accurate and up to date view of how students in all areas are performing.

From the start Lynn had been involved with the rest of the SLT in strategic decision-making for the school and this includes discussion on pupil attainment and progress as outlined by Ofsted. When interviewed in 2011, the then headteacher, gave numerous examples of the increasing strategic importance of her role and the impact on the school including networking with other schools and of running services, previously the province of the local authority. In the early stages there was some opposition to bringing a member of the support staff into a leadership role. Lynn found it quite difficult in the early stages because it was hard to make an effective contribution on certain issues. Now not just because of the SBM programmes but because her role has changed significantly in school, she contributes across the whole range of issues discussed. At the time of the first interviews in January 2011, two of her colleagues on the SLT who were acting as her 'informal' mentors recognised the ways in which Lynn had developed even at that early stage of her involvement with the SBD programme; they commented:

Lynn's knowledge of teaching and learning, the academic side as well as the financial side has definitely increased. She is now more confident in talking about teaching and learning...and contributes more in our meetings to these aspects of the role. (The SBD programme) has given her more knowledge and confidence. She's seen as an integral part of the SLT seeing how the whole thing merges together. She also takes on academic mentoring of students.

Lynn's current role (discussed in March 2013) involves her in being totally responsible for the 'Schools for the Future' rebuilding project. The team moved

onsite for October 2012 to begin preliminary work and from January 2013 activity has been 'full-on'. There are elements of rebuilding and of refurbishment as well. The project therefore involves moving academic departments around and managing day-to-day arrangements with the builders. Lynn is the first point of contact with the project team and this commitment currently takes up a large part of her time. She also has responsibility for finance, personnel and staffing. Some of the more day-to-day matters like extended cheque runs have now been delegated. However the more strategic tasks of budget setting and financial monitoring throughout the year are still her responsibility. Delegation can be problematic at times, with colleagues approaching her first as in the past; when this concerns routine matters such as boiler maintenance, she is committed to ensuring that the person with delegated authority is approached first rather than her.

Lynn is currently studying for the financial accounting for academies programme with the NCTL. Although this was not a programme she might have chosen, as the school is likely to become an academy, she saw its relevance. The school is keen to control the move to academy status by being able to make its own choices and working with local primary schools. The plan is to become a federation of one secondary school with a small number of primary partners. The secondary school is keen to have their ethos and expectations driving the academy as opposed to being part of a larger grouping of schools. This requirement helped to inform the decision for Lynn to enrol for the NCTL programme. Smestow is to become an Academy on 1 February 2014, and will be part of ECMAT (Education Central Multi Academy Trust) and will be supporting another Wolverhampton secondary school which has received a notice to improve.

She was also active within the local community of school business managers being Chair of the Wolverhampton Association of School Business Managers. She considered becoming an NCTL advocate for SBM/D, possibly when the SBD programme had been completed. This involvement both actual and potential was seen as a direct result of the confidence that has been gained through being involved in SBM/D programmes, more so as the level of study has gone up because of the need to know more and to reflect on learning. However with all the recent changes at school Lynn is unable to pursue this at the moment.

Some of the middle leaders at the school are involved with NCTL programmes. The current headteacher, who had been deputy head for five years previously at the school before he replaced the previous headteacher, had already completed the NPQH,

## 2. Opinion towards the SBD programme

In terms of her (2013) expectations of improvement based upon the SBD programme, Lynn spoke of the effect upon her knowledge and understanding of business management. The SBD programme had widened her experience and definitely had given her a sound knowledge base for the challenges that have come since. The (SBD) programme exceeded her expectations; what she gained from the SBD was so relevant to the changes that were and are happening. In 2011, the previous headteacher commented on Lynn's decision to take the SBD programme by observing that: 'There is status and respect by saying you are on the Director level'.

Lynn was able to personalise her SBD programme while studying but feels that this has become important after the programme.

This was one of the best things about the programme. You should personalize not only to yourself but to your school's circumstances. The SBD programme in particular was highly relevant in the light of all the changes that have been happening in government (policy) now. I look back and think I really learnt a lot.

She has been re-elected for another three years to be chair of the local group for business managers. She feels disappointed that others have not gone on to do the SBD programme from her area. In her view the situation in Wolverhampton has moved quite fast for school business managers and they view the time commitment for SBD as intense. Lynn can understand why people have not taken the big jump from the ADSBM to the SBD programme. 'I don't think I could do the programme now...with the way things are at work...to be able to give that time commitment'.

Relating the programme to her current management of staff, she talked of her enthusiasm for encouraging her colleagues to be developing all the time. She has mentored two of her colleagues through the CSBM and is trying to encourage a colleague onto the DSBM.

I don't like their doing one-day courses. For proper professional development, they need something 'more meaty and a programme they can learn from over a period of time.

The school in its current status is over-subscribed and hasn't therefore needed to do a lot of marketing to attract students. However last year Lynn ensured that details of exam results were placed in the local newspaper. The best form of marketing of the school in Lynn's view is through working with local primary schools. The children, their parents and their teachers then know about Smestow School. Lynn also works with some of the finance staff in local primary schools. The Headteacher at Smestow wants this to be taken further once academy status is achieved and recognises the increase in her role and the additional responsibilities in relation to major projects. Lynn's expectation is that if we become an academy my job title will change to Business Director from the current operational title of Business Manager.

There has been little change over time in relation to the participant's and the school's expectations of the SBD programme.

The whole suite of SBM/D programmes was long overdue and the way it has been done is the best it could be. I just hope they continue to develop it although I don't think they (the National College) can go further than the SBD without going into the Masters' route. I recommend the route to Business Managers and to people outside education who want to get into that area of work. It will only work however if you become attached to a school, because of the need to put ideas into practice.

As part of the SBD, Lynn completed an elective M level module on Human Resource Management at the University of London. She found this work very different from the assessed elements of NCTL programmes. The group studying were largely Headteachers completing their Masters and Lynn was coming in for just one module at that level.

In 2012, just after completing the SBD programme Lynn commented that:

I really loved the course. I thought I achieved an awful lot as it stretched me out of my comfort zone.

Although I had got to know a lot of people on the (SBD) programme from previous programmes, there were new people on the SBD programme and I had to work with them. People have different ways of doing things and I found that very valuable.

### **What might have been improved?**

The main challenge while doing the programme was that of time commitment while also coping with the pressures of doing your job. That pressure impacts on the time that you can give to the programme and the importance of making best use of that

time on all occasions. Lynn indicated there was a need for more face-to-face sessions and that WebEx could have developed further

In 2012 Lynn felt that there might have been a bit more time on the face-to-face events; perhaps three days rather than two on some occasions. Groupwork was sometimes very rushed and presentations needed to be given more importance. Whilst recognising that this would take people out of school for longer there was a feeling that things were rushed at times. Her views had not changed by 2013. She still believed that there could have been more face-to-face events; for example a quick one-day catch up at an intermediate point in the programme. At times there was quite a long while between face-to-face sessions. Some of the WebEx sessions didn't happen for one reason or another. 'On one occasion the WebEx was restricted to the tutor and me because others had cancelled.'

Soon after she had completed the programme in 2012 Lynn recalled that there was still a little frustration over delays in the availability of materials. This improved but not until the end of the programme. She and others recognised this as part of being involved in a pilot project. The quality of materials had remained good. Issues that had occurred in relation to a delay in the return of work appeared to have been resolved and matters improved during the course of the programme.

### **3. Content and added value of SBD**

The personalisation of the content of the SBD programme gave Lynn the opportunity to focus upon her needs but also upon the needs of the school. The networking and the relationships established from the programme are still seen as valuable although that those links may stop happening as time goes on. Lynn meets programme members at different business manager conferences and this helps to keep the network going. She still gets emails from others who remind Lynn of things said on the programme, which they have put into practice.

A number of the elements of the SBD programme came to fruition after the programme had been completed. The ideas on managing a project are now seen as helpful: Lynn had completed a study of Building Schools for the Future (BSF) within the SBD. She is therefore clearly able to see the benefits of what she learnt on the programme; she commented that it's so useful now! Another illustration from the SBD programme is the change in the process whereby schools and colleges convert to academy status; no longer are schools forced to convert because they are failing, but are instead becoming academies for other reasons.

Assessment and feedback from tutors on the SBD programme was regarded as excellent. 'We had both tutor feedback and moderator feedback, which was really

good.’ The quality of the tutors and their knowledge base was very important but also their not acting as if they knew everything:

I remember talking to Chris (her tutor) and he said that Ali is the best person to talk to on that issue. Then Ali phoned me. They were looking at things as a team as well. If they couldn’t give us the help we needed, somebody else could.

There have been changes in theoretical understanding as a result of the SBD. Lynn can also see the relevance of the elements of the programme.

When I am in SLT, I understand what they are talking about and can see the relevance of what is being done.

From the feedback received on the SBD I was able to see good practice (in assessment). That’s what Ofsted will be looking at and what our students can expect. You gain a different view of education when you are on the receiving end.

Added value also comes from the fact that the content from the programme is always there to look back on. Lynn explained that:

A couple of months back I thought of an activity on teamwork, concerning peoples’ roles within a team. From my notes I was able to give that information to the team who I wanted to work together. The benefit had occurred on the course but it’s there to go back to now.

Lynn felt that the content was very good and better perhaps than the ADSBM, being felt to be more challenging.

You don’t want to leave a course the same as when you started it so it needs to challenge you and stretch you. It certainly did that.

It remains a difficulty however for Lynn to separate out the impact of the SBD from the impact of her involvement with the other three SBM programmes. However she feels that of the four programmes, the SBD is the one that has stretched and challenged her the most.

## **4. Impact**

The overview is that the SBD programme has given Lynn the confidence, security and the knowledge base to undertake her role. There is also the awareness that it is not necessary to know it all; instead Lynn knows now where to go to find things out. There is also the knowledge that there is someone who can provide the information

required. Quite often she will be asked about policies. The school now subscribes to 'The Key' an online resource for schools. Anyone who has completed a policy can make it available through The Key as an online resource for schools. The site is for senior leaders in schools and Lynn found out about this from another participant on the SBD programme. There is also the confidence that comes from knowing she can e-mail a contact and ask for guidance, eg a job description for a particular role.

Her role is changing as the school moves towards Academy status. This move and the BSF project provide examples of her involvement now in change management. There have also been discussions with Wolverhampton University with the school to become an academy within the trust set up by the university.

Greater understanding of teaching and learning has developed from the programme. It has helped in relation to quality first teaching whereby young outstanding teachers are acting as coaches for other teachers. Lynn has been working with them; a role she views as really insightful and positive with younger staff being full of enthusiasm and a willingness to take risks. Together they have developed what has been called 'A Teachers' Pack'. This has different things within it: a timer, a stress ball, materials which have been used by members of the group. For example during discussions with pupils, the stress ball can be thrown to someone and they will then have to talk. The group of teachers has contributed to staff meetings leading sessions on teaching and learning.

Successful completion of the SBD programme has led to Lynn having extra belief in herself.

I'm working in education. I'm not a teacher but that doesn't mean to say that I don't know what is happening in teaching and learning. It's the knowledge I've gained from participating in all of the [NCTL] portfolio of SBM/D programmes that has given me a belief in myself.

The impact is mostly in terms of belief in myself, but also in terms of the rest of the staff believing in me.

Lynn is clear about the next steps for her in the near future: preparing for academy status, completing the BSF project and continuing as chair of the local School Business Managers group. There is also the offer to continue supporting other school business managers who go onto the programmes. Currently Lynn is involved in doing this informally and locally.





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