



National College for
Teaching & Leadership

School business manager learning programmes evaluation

**Case study report - School business
directors (SBD) in schools/federations in
receipt of a primary partnership grant**

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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 supplementing the early case studies by focussing on those undergoing development as SBDs but also within school collaborations awarded primary partnership grants.

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 Director (SBD) Pilot Programme**

Four case studies aimed at providing a cross-section of early experiences in the pilot SBD programme.

- **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 SBD pilot programme: School Business Directors Pilot Programme

The case studies: These covered participants entering the second pilot year of the SBD programme (September 2011-July 2012) and included:

- Diane Lane, Newcroft School (Primary), Shepshed, Loughborough, Leicestershire.
- Gareth Atkinson, Belleville School (Academy Primary), Wandsworth, London.
- Tracey Brown, Lutley School (Community Primary),
- Sheila Tibbenham, Whitley School Cluster (Primary and secondary), Reading (Berkshire).

Participants were selected from those second year entrants who were in or attached to schools, or school clusters, which had received primary partnership (PP) grants.

Aim of the case studies: These interviews aimed to supplement the early case studies by focussing on those undergoing development as SBDs but also within school collaborations awarded primary partnership grants through NCTL. More specifically they were looking at:

- A review of participant school context, and any changing role and responsibilities, set within the partnership context.
- Exploring initial and any subsequent participant reflections on their SBD programme experience against expectations, and views on programme content and challenges.
- Participant views on improvement that might be made to the SBD programme.
- Providing a continuing assessment of impact to update and extend (early) impact assessments on participant/school and any contributions to the partnership arrangements.

The focus was on semi-structured interviews using a 'tracking back' and comparative approach over the evaluation period.

Scope and coverage: Interviews with each of the four participants were conducted mid-programme, a few months after completion and with a final interview around a year after graduation, and specifically:

- The initial interviews (with participants, headteachers and partnership leaders) were conducted in late summer and early autumn 2011 (September-November).

- Mid evaluation with participants approximately six-months after graduation (October to December 2012).
- Concluding participant interviews (September to October 2013) around 18-20 months after graduation (interviews with participant, headteachers and in one case with a proxy - the partnership lead following the individual participant's emigration).

All interviews have been written up, verified and produced as final (cumulative) case studies.

Common learning issues from the SBD cohort: The case study evidence focussed on individuals participating in SBD who were working with primary schools, and in the context of recent awards of primary partnership grants. A key requirement from school or partnership leadership (in most cases) was the need to develop higher-level business management capacities. Findings showed:

- Two participants were relatively new to their posts and both had been directly supported in their transition by the fast-learning curve provided by the SBD programme and interaction with experienced school business managers (SBMs).
- Although coming from different contexts, all saw benefits for their improved theoretical understanding. Most commonly this was of systems leadership and policy issues which had particular relevance to their partnership development.
- SBD face-to-face and group sessions were seen as consistently good, although varying in depth. Coaching support and reciprocal visits were each especially welcomed by two of the participants. Major strengths of the programme have been the blended approach and opportunity to link SBD programme activity to school/partnership needs (eg research assignment).
- Opportunities for informal learning and networking within the group of participating SBMs were also valued and have provided a continuing knowledge and resource asset to SBD graduates, in relation to partnership development and academy conversion.
- The programme approach was welcomed by all and notably for 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.

The only concerns related to the pace, intensity and clarity of content of the SBD programme. It was felt that more could have been done to provide more consistent on-line support and early direction on precise content (and timing) to help them better integrate the programme with day job demands. Navigating NCTL resource web-space was also problematic, although resources when located were seen as high quality.

Common SBD impact issues: positive impacts were identified by all case studies - for themselves and their host schools, and partnerships arrangements. More specifically:

- Confidence building was widely reported as a personal impact, and particularly in working with senior leadership teams (eg taking devolved responsibility for managing the transition for an incoming new headteacher) and also in leading aspects of partnership with other schools.
- All but one had an extended role in the school leadership teams - or had moved jobs to secure greater responsibility, and the greater systems knowledge and theoretical understanding (eg on emotional intelligence) was welcomed by senior colleagues.
- SBD programme engagement with emerging national policy issues had a particular impact for some participants for guiding non-teaching school improvement including establishing management pathways for academy conversion.
- Participants were all more outward looking, and two had substantial success in securing external funds for school capacity building, or contributing to academy conversion.
- SBDs' wider capabilities and extending roles also had productivity gains for schools particularly in releasing headteachers to focus on teaching and learning improvements. This was especially important for one school now facing an Ofsted notice to improve.
- Personal development had seen three graduates move to either SBD advocate roles, chairing local SBM groups or designated as specialist leaders for education.

Common primary partnership impact issues: One SBD had very little engagement with the primary partnership grant or its use, but others identified positive impacts, although mostly early in the process. Two of the partnerships have not been sustained but have developed (under the SBD's influence) in other directions and with different membership. More specifically:

- Systems leadership knowledge had a particular impact for three of the participants in informing the further development of existing partnership working arrangements (eg school improvement cluster groups), or in new contributing to establishing new partnership arrangements with other schools.
- The PP grant had meant that two of the case studies had been able to sustain funding for the SBD's collaborative role at a crucial time of partnership development. In one partnership the role has become self-funding.
- All but one of the cases had clear synergies between the SBD training and the partnership grant, and in one case this had led to the development after the grant year of a 'hard' federation with sustainable common development goals.

- SBDs took a lead in developing partnership systems and it was felt that development had occurred faster as a result of the grant and SBD knowledge than would have occurred otherwise.
- Two had seen significant direct cost benefits arising for partner schools from best value purchasing and/or common procurement arrangements.

Not all developments had been positive and in one case there had been an impact on the partnership composition, with accelerated moves towards closer collaboration and common systems exposing tensions between partner school leadership and the effective abandonment of cluster working.

School Business Director (SBD)/ Primary Partnership (PP) participant case study: Diane Lane, Newcroft Primary School, Leicestershire

This case study is drawn together from a series of (longitudinal) interviews with the participant, and colleagues in the school and partnership. The interviews were conducted in January 2011, November 2012 and September 2013. It represents their experiences in the three years since joining the first SBD cohort, and is based on 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, the (then) headteacher and the headteacher of a partner school. The first follow-up discussion, and concluding interview both involved semi-structured telephone interviews with the participant, and the final case study also draws on inputs from the incoming headteacher and the chair of governors. All interview reports and this final case study have been verified with the participant.

Summary: The SBD Programme

- The increase in Diane's self-confidence started as she progressed through the initial SBM qualifications, and intensified through SBD. This has served her particularly well in managing the school's transition in difficult times from an established headteacher to an incoming head facing an improvement agenda.
- The knowledge derived from SBD, and particularly of system leadership, have also contributed directly to early successes in contributing to wider schools collaborative efforts through the local authority 'cluster', and its early primary partnership work.
- SBD has been of special value thanks to in the school placement and research project - both of which have been harnessed in subsequent improvement work. It has also been valued for informal knowledge exchange with other participants, off-course informal networking and the tutor support on the programme. There are no identified weaknesses in SBD design or content gaps, and the programme is seen as having been highly relevant to school improvement issues.
- Impacts from Diane's training have been: raising the skills, motivation and flexibility of non-teaching staff at Newcroft Primary; identifying opportunities for external funding and developing an extended services role for the school, including pre-school provision, breakfast and after school provision; undertaking more active external partnership roles; and managing the cross-school adjustments following the run up to the retirement of an established headteacher.

- SBD has also enabled a direct and important improvement contribution in other schools, including transforming funding and facilities in other primary schools with development challenges and leadership changes.

Primary partnership funding

- The SBD programme and the PP project have limited inter-actions as much of the PP focused activity started prior to the SBD participation, and the participant was already an active player in those collaborations. This makes it difficult to assess added value of the PP funding (to date).
- The PP funding helped to ensure continued partnership activity in pre-existing school clusters, and mainly in the areas of continuing staff development for support staff and in their contribution to school improvement issues.
- PP-related collaborations made early and substantial progress (in 2011-2012) but have since been held back by wider reform issues in the partner schools, and contrasting views on academy conversion.
- The SBD's training in systems leadership has helped identify partnership development challenges, but has not yet been able to overcome active resistance among some school leaders to a higher profile 'systems leader' role by the SBD in the primary partnership.
- With the end of the primary partnership grant, and major changes in school leadership in partner schools, the cluster of schools is looking to re-forge an alliance which may involve a different focus and membership.

Newcroft Primary: Key facts

Location: Shepshed, Loughborough

Scope: Primary school with a Foundation Stage 2 entry

Age range: 4-10 years

Size: 230 pupils

Other information: Basic Skills and the International Schools Awards, Healthy School status and an ActiveMark.

1. Participant and school background information

School background: Newcroft is a medium-sized primary school in a semi-rural area of Leicestershire. The school has had difficult times and saw leadership changes first in 2006, when it was judged to require special measures. A new headteacher introduced extensive changes to its facilities and organisation, including the numbers and structure for support staff. The school was removed from special measures a year later, subsequently assessed as satisfactory, but with continuing challenges in literacy and numeracy achievements, and evaluation of teaching quality. An early emphasis of the (then) incoming headteacher was a commitment that 'every adult in the school contributes to performance' introducing a substantial commitment to developing non-teaching staff.

Diane, as the school business manager has been at the forefront of those and other changes, and was instrumental in this development, working to implement an early commitment to a programme of CPD for support staff. Recently, in December 2012, inspectors praised the behaviour of pupils and school safety, and also assessed as good teaching and learning in early years, but felt standards especially in literacy and numeracy teaching remained at average and with scope for enhanced leadership. Newcroft was classified as in 'need of improvement'. The former headteacher has now retired, along with one of two assistant headteachers, and a new headteacher has very recently been appointed to build on the reforms established and to address the continuing improvement challenges.

School business management in context: Diane has worked with four different headteachers at Newcroft, first joining the school nearly 20 years ago after a career break (from the engineering sector), and progressing to become School Bursar. She was an early participant in the NCTL Bursar Development Programme, and following successful completion was appointed SBM in 2005, later joining the school senior management team (SMT). She has continued to develop her role and that of other bursars as a facilitator/tutor of CSBM and frequently as an advocate of SBM. This additional role also opened up opportunities within the Local authority working with the advisers in the workforce remodelling team on non-teaching skills development issues. In 2008, the recently retired headteacher recognised potential for Diane to take further management responsibility and in particular for CPD with a focus on support staff remodelling. In April 2011 she enrolled in the second cohort in order to: '...keep up with developments', and with the intention of learning new skills.

These changes saw growing responsibility for a larger number of support staff, and in 'helping to set the strategic direction for the school'. Diane has developed the role in three directions:

- a) Raising the skills, motivation and flexibility of non-teaching staff - and with responsibility for the management, rostering and development of the now ten 'support staff' including a nursery nurse, an assistant school business manager (undertaking CSBM) - previously a business administration apprentice, administrative officer, premises officer, five lunch-time supervisors and also part time catering staff and cleaners. There are also two learning support assistants and nine teaching assistants (five as higher level teaching assistants (HLTA)) alongside the ten teaching staff. A key development was the introduction of an apprentice role both to increase capacity, and provide support for the SBM. The recruit has completed the apprenticeship, was recognised by the local authority for a National Apprenticeship Award, and has since joined the first cohort of the modular CSBM.
- b) Developing an extended services role for the school - led largely by the SBM in diagnosing opportunities, seeking and securing funding, and co-ordinating the necessary developments. Early on this has included the development of pre-school provision - which has been in place with pre-school entry since September 2011, and also breakfast and after school provision. Under her leadership, Newcroft has since secured Forest School status offering accredited outdoor education opportunities for its pupils, and offers a range of holiday provision with much of this open to others in the community. In this, and other developments, a significant part of the SBM extended role has been in identifying (and bidding) for funding to support these developments, including from the local authority and National Lottery.
- c) Partnership working with other schools - including with the local authority cluster of local primary and secondary schools, and since in wider improvement roles with the local authority. CPD programme development has been a recurrent focus for this collaboration. Post-SBD she has also worked closely with individual schools - as set out below, and in supporting and mentoring incoming SBMs. Participation in SBD was seen as an important focus for Diane in supporting this widening role and external relationships.

In tackling these changes, Diane developed a conviction about the importance of staff development as a key driver for school improvement, informed by an early audit of Newcroft's staff skills and gap analysis. A co-ordinated programme of skills and qualifications, awareness raising and training was later extended to specific generic training events at Newcroft, funded by the school to meet staff's widening aspirations and expectations - and with what is now seen as an active learning culture at Newcroft.

The school's CPD success caught the attention of other local primary schools, and Diane was invited to develop a cross-school initiative centred on a support staff training conference, with a range of taster sessions for the local primary cluster surrounding

generic needs, such as health and safety practice and safeguarding, funded by the local authority.

Wider links with NCTL: Beyond Diane's participation in SBD, and previously with the SBM programme, the school has had various links with NCTL. For Diane these go back to the early days of the Bursar Development Programme, with later school engagement including participating in the 'Head for the Future' programme and National Professional Qualification for Headship (NPQH) for the assistant headteacher (in 2009). In addition three middle leader teachers have undertaken other NCTL middle-management training and leadership pathways. The previous headteacher was also training as a cluster facilitator/tutor of the middle leaders development programme, and the recently appointed headteacher was a local leader in education (LLE).

Diane, in her role as school CPD leader, has been directly involved in identifying and promoting participation in some of these programmes. As a spin off from her role on the East Midlands CPD group, she was involved in the bid for funding an Aspiring Heads programme across Leicestershire, inputting to the bid writing which was subsequently successful.

In addition, Diane has been involved in various NCTL events and meetings to explore partnership structures and specifics such as Service Level Agreements, Operating Protocols, and the federation model. In recent months, these contacts have reduced partly under the pressures of managing change between the retirement of one headteacher and the transition process for the incoming headteacher. This has been a challenging time for Diane, who has worked closely with the chair of governors, and the incoming headteacher, to address early restructuring issues consequent on the Ofsted report and the loss also of an assistant headteacher.

2. Primary Partnership scope and context

Scope: The planned scope of the primary partnership (PP) centred on the Shepshed group of seven local schools - which consisted at the start of the grant of a cross-phase collaboration between two secondary schools (Shepshed High School and Hind Leys Community College), and five primary schools: Newcroft Primary included: St Botolph's Primary; Oxley Primary; St Winefride's Primary; and Belton Primary. In the latter stages of the partnership, Shepshed High School and Hind Leys Community became federated and are now a single institution.

This group was formed as a local authority Learning Partnership improvement cluster in 2009-2010 and was paired with the neighbouring Castle Donington Group. Through much of the grant period (2011 to 2012), schools in both groups were able to deepen their collaborations, although the planned spending under the grant has now concluded. In the last phase of grant period there were some changes to the organisation or the primary partnership, and most recently to leadership of the constituent schools. Although engagement has varied, membership had not changed from the original cluster grouping(s), beyond the amalgamation of the two secondary schools. Currently, however, membership is in a state of flux with new headteachers being appointed or about to be appointed in five of the schools (including Newcroft).

Primary partnership context: The cluster groups were encouraged by the local authority and developed initially as liaison groups for school headteachers, moving on to a 'harder' partnership embracing a wider range of staff. The primary partnership grant aimed to support this process with a particular focus on strategic cohesion, pursuing shared development issues, and capacity development across schools on common issues. An early focus was on sharing and developing staff expertise and which included:

- Specifying and commissioning high quality staff training to meet identified needs.
- Providing school to school support to enhance children's learning experiences on enhanced numeracy and areas such as out-of-school clubs.
- Other developments including a jointly-funded common family support worker and sports development worker.

Although initially outside the scope of the primary partnership activity, the Newcroft SBM played a key role in helping to shape and deliver much of the collaborative agenda of the cluster school groups - and specifically on the CPD issues for support staff. This started with a cluster strategy for 'Partnership Strengthening', and active partnership working.

The CPD focus complemented the work Diane had been doing first with staff at Newcroft, and subsequently with NCTL, Training and Development Agency for Schools (TDA) and East Midlands Regional CPD Leadership Group. In addition, IT training, maths and literacy NVQs for support staff were all undertaken drawing on the earlier skills auditing at Newcroft. The skills auditing model was later rolled out across the cluster and used to initiate combined development and training events. In addition, the collaborative 'needs analysis' for support staff and their skills, and the subsequent training activities have been shaped and facilitated by the SBM, and by early in the 2012-13 academic year this was seen to have demonstrated the scope for greater collective (cross school) action on issues of common interest, and achieved cost efficiencies by tackling things collectively that might be uneconomic if addressed individually.

By September 2012, these arrangements, supported by the grant provided for a much higher profile for support staff development in local schools. At that point a series of 'themed' Network Groups were formed on:

- Selected curriculum areas identified where support staff had a latent contribution.
- Numeracy support to children.
- Children's safeguarding.

Each Network Group was led by a headteacher of one of the member schools. A structure was developed which had network focus and priorities agreed by members and this was at the heart of the funded primary partnership activity. This active collaboration was largely co-ordinated by the Newcroft SBM, and welcomed as joint-capacity building by headteachers in the partnership who acknowledged that in addition to tackling some early capacity building issues for support staff, this had also helped develop collaborations and marketing expertise across schools, and to support knowledge exchange. For small schools with little capacity, the central facilitation has allowed developments which would not otherwise have got off the ground.

One headteacher also felt that the collective action, with the SBM as the focal point for this, had helped secure other resources - specifically from the local authority - which individual schools would not have had the skills (or confidence) to seek.

Impact of the Primary Partnership funding: The PP award was instrumental in further developing much of the collaborative activity and deepening the early partnership arrangements. This centred on providing a cross school capacity by part-funding for time allocated to that partnership role. Activities in the partnership were funded through a combination of sources, including subscriptions between member schools (pro-rata to pupil headcount), some payment for external services provided collectively (eg Relate outreach work), and ad hoc funds. Up until the start of the 2012-2013 year, this has supported the Newcroft SBM for 20 per cent of her time and included some supplementary capacity building work with individual schools drawing on her expertise and SBM training.

The in-grant activity has been substantial - with the key being the funding support for co-ordination and facilitation, combined with a capacity to seek and secure additional funds for CPD and other activities. These activities, however, have not proven sustainable following the end of the grant, and subsequent 'post grant' developments are looked at below.

Other collaborative and partnership activity: Beyond the cluster activity, Diane has also been the focus for bi-lateral links between Newcroft and other primary schools. In 2011-2012 this included a two day a week attachment to Whitwick St John the Baptist Church of England Primary school. Diane was linked to Whitwick initially to provide basic administrative support services and later systems and capacity building to help upgrade the school's (then) poor performance. This followed local authority diagnosed performance problems at the school which in 2009-2010 saw the Whitwick headteacher, chair of governors, and school bursar each leave within a month of one another. The incoming headteacher (September 2010) had previously been assistant headteacher at Newcroft School and was very familiar with the efficiencies introduced by Diane as the Newcroft SBM, and keen to introduce similar arrangements at Whitwick:

I knew the value of a professional and committed SBM to a school facing real challenges...I did not see how I could be free to tackle the teaching and other issues without that sort of expertise and help.

The new headteacher arranged an initially short term and part-time exchange with the previous Newcroft headteacher to develop and provide core systems and services. This continuation of this collaboration was strongly encouraged by the past and incoming Newcroft headteacher, and was extended to provide for a mentoring role by the Newcroft SBM to a County Hall CSBM trainee. The school secured a two day a week practical attachment of the same trainee as a local authority funded secondee.

This local authority secondee subsequently joined Whitwick on a permanent basis. She has since gone on to complete both the CSBM and later the DSBM programmes, and is planning to undertake ADSBM in 2013-2014. Diane has continued in an advisory and mentoring role to the new SBM, with the focus now on providing development support to embed new systems (eg procurement, project management, and extended services).

3. Opinion of the SBD programme

Participant expectations of SBD: For Diane, and the Newcroft headteacher, the expectations were that participation in the SBD programme would:

- Bring wider knowledge (eg systems management principles and practice) to Newcroft and potentially also to partner schools (eg jointly resourced staff development, and remodeling the workforce).
- Develop new skills and expertise to support ad hoc improvement needs arising for individual schools who did not have access to an SBM.

The school's vision has been for a far closer connection with other small local primary schools, not only in terms of sharing business and commercial activities but also sharing much stronger academic leadership. It was felt that such plans could not be achieved without having a strong and knowledgeable SBD in place at Newcroft. Participation in SBD - and Diane's further development - were seen as a strategic asset with the chair of the governing body commenting that: '...without an SBD, significant changes (at the school and in collaborations) would be inconceivable', and that:

The SBD is without question a key position in the school leadership team and to be effective should have a status on the level to an assistant head, such as here at Newcroft.

Newcroft's, and Diane's relationships with the wider school cluster participation had been based on an implicit assumption this co-operation would move towards some more structured form of collaboration. Views in the partnership aimed at securing a 'hard federation' were mixed, but in 2011-2012 the member schools were committed to putting in place some of the levers for change. This included establishing cross-headteacher management across the primary partnership headteachers, a primary partnership budget and some common facilitation through the Newcroft SBM.

One of the collaboration building blocks was seen to be developing cohesion within the group, and Diane saw moving from a facilitative role to support for shared learning as vital to further integration. In this, she made early contributions in:

- Developing shared communications including a partnership website which she manages, with an embedded communications facility.
- Supporting a partnership approach to external networking (eg to county-wide business networks and a cross-Leicestershire Widening Workforce schools programme) - enabling the schools to access activities and initiatives which are much wider than any one school could do.
- Working directly with the (then) TDA Partnerships Programme and in particular harnessing the Partnerships Toolkit identifying the need for a focused Action Plan to influence the agendas and working arrangements of the network groups.

Systems leadership skills were seen as crucial to underpin these developments, but beyond this Diane had more limited expectations of SBD in enhancing her business management knowledge and understanding. This was principally because these were thought to have already been developed to a high level through participation in DSBM/ ADSBM.

For Newcroft, these expectations were well aligned with the school's need to retain and fund a highly capable individual within the SMT. SBD was seen as providing for a distributed role, part-funded by other schools and external funds, and by encouraging extended services and partnership work. This has evolved over time as Newcroft has grown capacity among other staff, by CPD and recruitment, to enable more out-working

by Diane. In addition to the (then) business administration apprentice recruit, this included the further development of support staff through NVQ and other training to take on more day to day responsibility.

Synergies with career development: Beyond the progression from the SBM qualifications, SBD participation did not have any particular links with/synergies to Diane's other career development/qualifications. For her, the motive was job enlargement and not career progression, noting:

I feel I have the job I want - and progression is about a moral purpose working more with the partnership and with other SBMs.

She is now considering taking this knowledge and her collaboration experience one step further and becoming a specialist leader in education. However, she is keen to ensure the new management arrangements at Newcroft are bedded down and will also need to look at this in the light of the new headteachers expectations of any changes to her role. An early focus for this has been in leading CPD arrangements for support staff - and for governors, and for undertaking a cross school review of training needs for all support staff in the school improvement plan.

4. Content and added value of SBD to date

Programme value: Joining SBD, Diane was initially apprehensive about her capacity to undertake a Masters (M) level programme while combining this with an already demanding extended SBM role. Added to this she was concerned that her background from the primary sector would be as a generalist and would not compare with the more specialist knowledge of those participants coming from secondary schools. On reflection, she senses that her breadth of experience has been valued by others in group and other work.

Diane regards the SBD programme as transformative and values the experience highly. In particular she sees its major value in collaborative learning. Vital to this have been the in-built opportunities in the programme for development through both structured group and project work, and knowledge exchange with other participants through shared course working and including informal dialogue at NCTL-based sessions and outside. These are seen as more important than the formal content of the course or knowledge built up from course-work.

Programme design and delivery: By mid programme Diane saw the design and delivery of the SBD programme as well placed and effective, and since has continued to regard its blended delivery and approach highly. By half way through the programme Diane saw some distinct contributions to her own (improved) theoretical understanding and in particular of systems leadership which were described as:

Helping me to get to grips not just with the ideas but also the application...how systems leadership can relate to different forms of partnership in practice.

After two years of applying SBD knowledge and experience Diane praised in particular:

- The relevance and focus of the programme which she still sees as current and well fitted to the needs of highly experienced and mature SBMs.
- Most of the content was described as useful, although some is seen to have been more relevant to the primary context (and partnership needs) than others.
- On-line support and communications is thought to have worked well, with Diane valuing highly the opportunity afforded by on-line posting and where dialogue and feedback was also seen as very helpful.

Tutor support was thought by Diane to have worked very well in her continuing encouragement and with ad hoc liaison to check on progress, which helped sustain Diane's motivation. Where she needed to occasionally raise queries - usually of clarification on assessment processes, the feedback was always fast and helpful.

Her only concerns mid-way through the programme were with its demands and intensity. Although she was subsequently able to balance the demands, she was conscious others on the programme often were not able to combine the needs of participation and assessment with demanding day jobs. For her, the main challenges of participation were in coping with:

...the inevitable challenges of personal time-management. This is about the sheer work-load you need to get through the academic side of the programme and its assessments...and fitting this all in with the day job.

For Diane, these challenges were reflected in what she saw as a high SBD drop-out rate among other participants. She felt the 'M-level' focus for the programme was essential but that participants could be helped by NCTL in better and more timely information before and during SBD about the expectations and demands placed on them. This was seen to centre on learners being able to anticipate the precise nature, and sequencing, of the specific demands of the course and the coursework, so that each participant was able to organise themselves to reflect demands in their day-jobs.

Programme overview: Diane describes SBD as (an): '*Amazing programme*' and that of all the NCTL courses she had joined this was the most beneficial. For her, the main strengths have been:

- Expanding her knowledge - principally through group working and providing, for her, a clear appreciation of contrasting leadership styles and working across these in partnership situations.
- Opportunity for undertaking a school placement and with time to reflect on contrasting experiences and responses to challenges in other school contexts.

- Opportunities also for informal knowledge exchange with other participants, and through off-course informal networking.
- Tutor support has helped her to gain the most from the formal learning opportunities.

She has valued the placement experience particularly highly, joining an International School in the Netherlands for a week, and at two sites (Amsterdam and the Hague). She continues to draw on knowledge and experience drawn from that school's partnership arrangements, and how these were facilitated particularly in 'executive level' business management of partnerships. This has had a direct bearing on her understanding of effective cross-schools business support and governance issues.

Programme improvements: Diane does not see any weaknesses in the design of SBD, or content gaps but she saw a need to better manage the intensity of the programme. This required much greater predictability of content and needs for participants. She also sees value in having more emphasis on placements and not just the research and critical thinking where she feels the M level requirements for assessment have been inappropriately driving the intensity of the programme. On specific content the main added value has been providing a timely and informed stimulus to thinking about systems and leadership.

5. Programme impact

Impacts achieved: By the end of the 2012-2013 academic year Diane and others in the school were confident of a range of impacts from participating in SBD, although the context for this has changed sharply in the last few months. At Newcroft Primary, and in the school's partnerships with others, there has been significant impact from increased knowledge and confidence, although as she has wide experience of NCTL programmes she finds it less easy to attribute specific improvements wholly to the SBD programme alone.

For Diane, improvements have built on what for her have been a continuous process of knowledge building including in particular from her participation in DSBM and subsequently SBD. Most of the impact areas have centred on capacity building issues - at Newcroft and more widely. At Newcroft this has included:

- Further developing extended services to enhance the school's provision and its relationships and support to the local community.
- Remodeling the 'support' staff structures to fit the school's extended role, with the additional benefit of developing capacity to release her for wider activities in particular through the earlier initiative to recruit, and retain, the business administration apprentice - now undertaking CSBM.

- Managing the change management arrangements, and minimizing associated disturbance, in the recent transition between the outgoing (retiring Headteacher) and the incoming headteacher, including leading many of the transitional arrangements.

The recent leadership change has presented a series of unexpected challenges for the school and its staff, and with both the established headteacher and one of two assistant headteachers leaving at the same time, has placed great demands on management continuity which have fallen largely to Diane. In making the necessary changes, and in supporting transition, the chair of the school governors has noted that:

We are much further forward in our planning by having an active SBD; ensuring the school is safe, sound and, of course, solvent, setting the key business environment for raising standards at Newcroft Primary School in the future.

More specifically, and as one of two remaining members of the SMT she took responsibility for managing succession, emerging staffing issues and related difficulties across the school, working especially closely with the chair of governors and the local authority in managing consequent legal and other issues. The new school headteacher has endorsed the importance of Diane's role in what was seen as a 'difficult transition period', noting that:

As a constant in the leadership team, and with a strategic overview, she has provided support, advice and guidance to me that have helped staff to adapt to change effectively whilst focusing on the need for raised standards.

More generally the new headteacher drew attention to Diane's vital role within the new senior leadership team to quickly develop the trust, mutual respect and shared philosophy (particular related to change management) to enable the school to embark upon a programme of rapid improvement. Diane was described as the fulcrum for this.

In addition, the headteacher recognised the importance in the school improvement of the school's extended services and how there remain strongly embedded through Diane's clear and concise delegation of roles and responsibilities to key members of staff. Supporting this she is also leading targeted performance management processes for these support staff and which he describes as: '...having a good impact upon morale as well as helping them (support staff) to respond to the need for change'.

Diane herself felt she had the confidence to tackle this largely because of the experience of SBD: ‘...without the programme (SBD) I just would not have had the knowledge...or confidence’. In the event, the process was managed effectively with the new Headteacher joining formally in September 2013 and able to make a fast start at addressing residual improvement issues raised in the Ofsted inspection.

There have been a number of significant organisational changes aimed at improving outcomes for pupils and Diane’s role in developing CPD for support staff has a noticeable impact upon the confidence of all staff to recognise their contribution to pupil achievement. Although there is ‘still some way to go’, the Headteacher feels that as a result all support staff now play an active part in delivering teaching, from individual support for children on the SEN record to small group and occasional whole class learning. Diane’s role in this is central and will also include analysing the training needs of all staff this year to develop a programme of CPD to help tackle change across all improvement priorities. In parallel, she is also now also taking on the governor link role to support the development of the governing body and to seek out appropriate training and support for governors.

Outside Newcroft, at Whitwick primary school, the Diane’s secondment has secured a transformation of that school’s financial and management systems, and also driving forward the procurement and execution of extended services and facilities. A recent inspection at Whitwick has confirmed the value of those improvements in the schools offer recognising the school has introduced a range of improvement initiatives and extended services, based on accurate self-evaluation, and which have directly contributed to improved teaching, pupils’ progress and safety. Specific enhancements have been new staff grading systems, previously seen as ‘chaotic’, with knock on benefits for staff budgets, staffing structures and a budget saving in the first 12 months reported to be £64,000 for the school. These savings, attributed almost wholly to Diane’s energy and knowledge, have seen these savings applied to other developments in the school including capital investments in enhanced teaching and catering facilities, and extended services including:

- A breakfast club established within the school for the first time.
- An out of school group for children, and also a pre-school form - also the first to be introduced at Whitwick and funded by Nursery Education Funding (NEF) and paid hours.
- The funding, procurement and development of a children’s kitchen, and new building work for the pre-school to required safety and care standards.
- Refurbishment of some of the existing premises to upgrade classrooms and support facilities, and a new children’s play area.
- Purchase and installation of enhanced ICT for teaching (including classroom laptops and classroom projectors).

The synergy of these collaborations here have been crucial with Diane commenting:

This has been an intensive programme...a lot needed to be done and has been done...we were able to get things going quickly because it built on a lot of the things I had already done at Newcroft. Without this things would have taken longer.

Beyond the gains at Newcroft and Whitwick, SBD provided early gains to the primary partnership through Diane applying new skills and knowledge and developing:

...much greater confidence in working with the primary partnership...and in sharing knowledge with others.

Sustainability of impacts: The impacts at Newcroft and Whitwick are seen as well-focused, durable and based on sustainable resourcing of the added capacity, enhanced management systems and facilities. At Newcroft the value of these arrangements have been tested in the fast start for the new headteacher, embedding the transition arrangements, and putting in place early (and continuing) CPD for support staff - and governors. The headteacher and chair of governors both feel these are proving robust.

Partnership gains through the school cluster collaboration involving Diane, although initially important have proven less durable than those for Newcroft and Whitwick, and where Diane has been working unilaterally with individual schools. This has come from a combination of circumstances and with capacity improvements stalling early in 2012-2013 in the Shepshed and Castle Donington Primary Partnership activity. There were unsuccessful attempts by some of the Headteachers to build on early collaborations and cross-school co-operation through agreeing a protocol for greater formalisation of the arrangements, common aims and objectives, and formal resourcing for the partnership, despite support from NCTL to explore common ground and needs. This included a senior national adviser attending a Partnership meeting of the school cluster in order to help explore and deepen strategic relationships. In the event, Diane felt this was a negative experience which served to intensify suspicions and concerns over loss of independence among some school leaders.

Much of the resistance to formalising the evolving partnership arrangements was seen to have hinged on contrasting perspectives of different school leaders and in particular their interpretations of the academy conversion. Different positions by different schools in their aspirations for, or required moves towards, academy status, have resulted in fragmentation and sub groups forming in the cluster. The contribution from the senior national advisor was seen to have had the effect of bringing to a head those divisions. The academy issue came to dominate the primary partnership in the 2012-2013 academic year and with much less sense of common purpose and cohesion.

As a result Diane's previously extensive role across the primary partnership has now diminished and the partnership arrangements are now thought not likely to be sustainable in their current form. For this partnership the proposals for an 'extended partnership' have proven to be seen as too far and too fast for school leaders who often lacked trust between themselves and did not understand the role and potential of an SBM with the capability to work on improvement issues across different schools. At the time of writing (September 2013) there has been a substantial change in school leadership across the partnership, and any further developments will need to await the bedding down of incoming new headteachers. The lack of a succession planning arrangement in the partnership, which Diane had previously been seeking their commitment to put in place, has also compounded the current transition difficulties.

Challenges for future impact: At Newcroft the challenges are thought to focus on sustaining a momentum of improvements to meet the Ofsted requirements. The new headteacher is looking for wider cross-school collaboration and knowledge exchange to help inform this, and Diane is likely to play an active role in building those relationships. The collaboration between the teaching quality improvements to be led and directed by the new headteacher, with the effectiveness of business management (and aspects of external collaborations) through Diane, are seen to be vital to achieving the aims of the school.

In the collaborations within cluster groups of schools, the challenges for securing impacts from Diane's experience, and the activities of the primary partnership, raise more extensive and enduring problems have currently seen a hiatus to partnership development. Consequently, collaborative actions are currently mainly limited to bi-lateral co-ordination, and to smaller satellite groups of schools and groups often too small to provide for viable academy groupings and with insecure foundations. The need for schools to improve to a benchmark good standard is also likely to dominate future collaborations.

The new headteacher is currently evaluating the impact of the local area partnership work and how this has fallen away in recent times. Some redirection is expected especially as he has brought with him the opportunities for collaboration in a wider primary partnership of 12 other Leicestershire schools who are seen as better linked by a similarity of vision as opposed to geography. This will enable the extension of the networking opportunities for subject leaders and the senior leadership beyond the local area, widening the scope for leadership within the school. There is the necessity for a strategic driver for this partnership and the new headteacher is working with colleagues to utilise the Diane's expertise to coordinate the approach to school improvement across the schools.

The achieved impacts have consequently been mixed and stronger for the host school and for some bi-lateral inter-school improvements. For Diane, this raises issues about the viable role for an SBD in the primary sector and she feels that the course, and her own partnership working experiences, have shown that:

It is a very different role for an SBD, in the primary sector schools are small, budgets are limited and the SBDs real contribution must come through collaborative work.

School Business Director (SBD)/Primary Partnership (PP) participant case study: Gareth Atkinson, Belleville Primary School

This case study is drawn together from a series of (longitudinal) interviews with the participant, and colleagues in the school and wider partnership. The interviews were conducted in November 2011 (seven months after starting SBD), December 2012 and September 2013. It represents their experiences in the three years since joining the first SBD cohort, and includes the initial (baseline) mid-programme interview, the post-graduation follow up interview six months after completion, and the concluding interview. The first (baseline) interview included interviews with the SBD participant, and Headteachers at the host and participating partner school. The first follow-up discussion, and concluding interview both involved semi-structured telephone interviews with the participant, and the final interview also drew on contributions from the Teaching School Director who now runs the Partnership. All interview reports and this final case study have been verified with the participant.

Summary: The SBD Programme

- Gareth joined the school as its first SBM post-holder from diverse management experience mostly from Higher Education, and with no direct experience of school management.
- He has been directly supported in his transition by the 'fast-learning' curve provided by SBD and the opportunity to interact with other more experienced SBMs to widen his knowledge of management in a school education context.
- Although initially challenged by the content of the SBD programme, and by the pressures of combining this with academy conversion in the school, he was able to better integrate the programme with his work in-school in the second half of SBD.
- Gareth saw early benefits for his own improved theoretical understanding - especially of systems leadership and policy issues, for his own confidence, and for building a systematic approach to reflective practice into day to day circumstances in the school.
- SBD face- to-face and group sessions were seen as consistently good, although varying in depth, but the major strengths of the programme were the opportunity to customise SBD programme activity to Belleville needs (especially the research assignment).

- SBDs' opportunity for informal learning and networking with seasoned SBMs was especially welcome early on and mid-programme. These informal co-operations continue, and have provided direct help to Belleville's Academy conversion.
- Gareth felt the programme placed great challenges in its intensity for busy professionals. This was not helped by the fact that on-line support was patchy, with some core resources difficult to locate, and professional support not helping to overcome this. Navigating NCTL resource web space was also problematic, but accessed resources when located were generally high quality.
- He continues to derive value from the programme - and the wider SBD network, although he feels that rising demands on his time in this expanding school means the opportunity to use much of the knowledge gained has yet to be capitalised on.

Primary Partnership Funding

- SBD and the primary partnership (PP) project have no inter-relationship for this participant who has little knowledge of the PP engagement and no direct role in its management or support, which now sits with the Teaching School Director.
- The PP award has been run independently of the SBD, initially by the Belleville Headteacher and, since the inception of the teaching school partnership, by the Director of the Teaching School. Gareth's knowledge and skills from the SBD programme has consequently made no contribution to the Primary Partnership activities.

1. Participant and school background information

Belleville Primary: Key facts

Location: Wandsworth Borough, Greater London

Scope: Primary school - first primary Academy in the Borough, and Teaching School

Age range: 3-11 years (including two nursery cohorts)

Size: 800 pupils

Other information: An Ofsted rated outstanding school, the only primary academy in the Borough, and where the current Headteacher is a national leader of education. The school is the joint hub for the Belleville-Southfields Teaching School Alliance.

School background: Gareth joined Belleville, an expanding primary school in Wandsworth, as School Business Manager for the start of the 2011-2012 academic year. At that time, Belleville, had started the process of converting to an Academy as an 'Outstanding' school with a reputation as a pioneer and innovator in South West London. Belleville completed conversion and remains the only converted primary academy in this London Borough. The Belleville academy has since gone on to become a teaching school (Belleville-Southfields Alliance).

Belleville offers integrated provision for 3 to 11 year olds with a roll of 800 and expanding shortly to 880 children including over 50 in two nursery cohorts. Shortly before Gareth joined, Belleville had taken over and renovated a second site (Meteor Street) and which now supports four class groups, and underpins the continuing expansion of its school roll. It has a budget of over £4m and staff of over 100. Located in an ethnically and socially diverse area of SW11, Ofsted at its last inspection described the school as:

...highly organised school, offering a carefully structured curriculum (with)...breadth, balance and richness.

Within this, the school has benefited from robust and stable leadership with the current headteacher, a national leader of education (NLE), in post for ten years and also widely active in wider school improvement activities in the capital and school partnerships including earlier City Challenge initiatives. The headteacher is supported within the school, by the Senior Management Team (SMT), which also includes the two Deputy Headteachers, two Assistant Headteachers and phase leaders, and also Gareth as the SBD. There is also ad hoc participation from other staff members as required.

School business management in context: When recruited, Gareth's role was new to the school. He was then new to management in a school education context, having been recruited from previously managing university student accommodation where he directed a budget of £11m and with a staff of 110. Looking for a change of career direction which could build on his management skills and provide a new challenge in an autonomous environment, he took on the SBM role at Belleville to help in growing the support capabilities of the school. His early responsibilities focussed heavily on its transition to an academy, with a plan to roll out his engagement with other school clusters and wider collaborations. Other early development challenges included:

- Further developing the school's underpinning management and administrative capabilities to support the new status.
- Building new capacity in support staff, widened workforce and in facilities to support Belleville's continuing expansion.

Much of this has been achieved during and after academy conversion. A particular feature is that the school has consequently rapidly expanded its support staff, to reflect its enhanced role, and as an active strategy for reducing procedural and other demands on teachers. This process continues, and the last year has seen a particular expansion of out-of-school clubs, and where Gareth now leads contracting, management and oversight - roles previously conducted largely by teachers. The re-focusing of activities has also helped more teaching staff to engage with the teaching school activities with other schools in the partnership.

His SBM role continues to grow, and in addition to the mainstream school, financial management, premises and property management and HR activities for the wider support team, he is now responsible for all aspects of before and after school care, and for managing schools admissions. The mainstream demands on his time are also intensifying as the school continues to expand through increased pupil numbers and from 'routine' management of a much busier and growing school. His own engagement in wider teaching school activities is limited, although around a fifth of the time of other SLT members is now devoted to those partnership activities. Gareth's expanding role has been a vital aspect of releasing senior staff for those activities.

Wider links with NCTL NCTL, mainly rooted in various staff engagement but in particular to the Headteacher's role as an NLE. The school's teaching school status is now an important focus for this. Middle leader teachers have undertaken National Professional Qualification for Headship (NPQH) and other CPD programmes. Gareth has also now completed the Academy Finance programme. In addition, two school governors have attended NCTL courses.

2. Primary Partnership scope and context

Scope: Belleville has had an active engagement in school collaborations in London for many years mainly through the wider activities and support for school improvement by the headteacher. In Wandsworth it has been a part of the Balham Extended Schools Cluster of eight schools - six primary and two secondary schools. However, Belleville's situation as the only primary academy in the Borough, and the lack of academy conversion elsewhere in this sector in Wandsworth has seen less activity in the cluster arrangements.

Primary Partnership context: Belleville applied for the primary partnership grant before Gareth joined the school, and he had little involvement with the primary partnership grant or partnership development. Grant activities formed part of wider partnership working, led initially by the Belleville head, and subsequently by the Teaching School Director (who is based at Belleville). The situation with the PP award and activities is that:

- Belleville's Primary Partnership activities became fully integrated within its Teaching School activities by the start of 2012.
- Belleville shares this role with Southfields Community College within the Belleville-Southfields Alliance (BASA).
- The Alliance employs a full-time Teaching School Director in cross-partnership co-ordination, and who has responsibility for the PP activities.

The grant funded activities had concluded by early in the 2012-2013 academic year providing for agreed principles of partnership activity within the primary partnership and capacity building action now embedded within the teaching school apparatus. Gareth was not involved in the bidding for the Grant, or objective setting, and the demands on his time from an expanding school role and especially early on from academy conversion has meant he had very little engagement with PP grant activities or implementation.

Impact of the primary partnership funding: Gareth has had no role in the PP or its monitoring, and has no knowledge of activities or their impact. In the longer term one focus is expected to be building systems leadership capacity across these schools - and to which the SBD post-holder is expected to directly contribute.

Belleville senior staff are now engaged in teaching improvement and associated capacity building and support activity with two-thirds of all schools in Wandsworth. This mainly involves a funding, monitoring and/or direct facilitation role within the Alliance. It is also the lead school on school-based initial teacher training (ITT) for physical education (PE) teachers in the Borough. Some 24 PE trainees are directly involved and Belleville is the only primary in the country doing this. A wider SBM Forum (as below) has also been developed although with membership much wider than the early partnership. The capacity for developing these roles was contributed to by the PP grant and the inter-school relationships built within that partnership.

Other collaborative partnership activity: Belleville's inter-school and associated partnership activities are not limited to those of the Alliance, and have deep foundations. Beyond the Alliance support activity (as above) and the PE ITT partnership. The school has also been involved in providing academy-related advice to some primary schools in Wandsworth and other London boroughs. However, academy conversions have reached a local peak and this activity has diminished in recent months.

The SBM forum was put in place in 2011-2012 academic year and has gained some momentum since by focusing on academy based business management and improvement-related issues. Gareth has played a leading role in shaping this Forum, and is the only SBD involved, providing ad hoc support. This involves termly meetings of SBMs and appointed staff in six converted schools in and around the Borough, although only five regularly attend. The forum has developed a role in looking for areas of joint policy or practice development, including on aligned 'Challenge to Admissions' policies and a joint-school lettings policy - which was led by Gareth. Other universal policies are likely to develop.

Beyond this Gareth has little involvement in cross-schools improvement activity. Although this was an aspiration at recruitment, and which was expected to be contributed to by the SBD participation, the rising demands of the Belleville role has seen his focus remain on this school.

3. Opinion of the SBD programme

Participant expectations of SBD: There were early expectations that Gareth's participation in the SBD programme would help to bring wider knowledge and more effective systems management to impact on common issues between Belleville and other school partnerships. As yet, however, the major focus has been on building capacity and systems management at Belleville itself to better support its continuing growth and development. In this, while Belleville is already an outstanding school, the SLT saw early scope for development of its support functions to support expansion and to minimize the 'backroom' functions of senior and mid-level teachers in managing that growth and its consequences. In tackling these issues, there was a need for Belleville to:

- Widen its (support) workforce by growing in-school capacity and expertise, in particular to reduce the administrative burden on teachers and to provide support.
- Establish a management and systems focus for these developments, and for non-teaching and management professionalism.
- Provide a focus for overhauling, and continuing improvement of, management of finance and the underpinning management and budgetary systems.

It was hoped that this approach to excellence through widening its workforce could provide for Belleville as an exemplar for primary schools elsewhere in London. The creation of the SBM focus, and Gareth's recruitment to it, was seen as the essential starting point for those improvements.

Outreach work by the SBM, supported by co-funding from other schools, was also seen as a part of this strategic vision. In this, the Headteacher initially felt that even a large primary school could not easily justify the level of capability offered by an SBD without having an outreach role for that individual which can be partly supported by others.

Gareth's participation in the SBD programme has been firmly geared to these aspirations. On his appointment (April 2011), he had been encouraged to review the usefulness of the course by the headteacher, and was attracted by the focus provided on professional development. He was keen the programme should provide him with better understanding and greater confidence in:

- Management of external relationships and partnership skills.
- Understanding of how schools work across the board and how they work with one another.
- Understanding how school policy is evolving and the issues and implications for school-to-school and collaborative improvement opportunities.

Gareth felt he initially had limited awareness of the system leadership focus for SBD, but now sees this as a focus for his continuing participation and the value added that can be offered to others.

Synergies with career development: On appointment, Gareth was new to the SBM role and as such SBD was his first training and development aimed at school-based professional development. He would have liked SBD to provide more of a direct focus on educational development processes to help him increase his knowledge base. However, he recognised that being new to school-based education his context and aspirations of involvement in the SBD programme were unusual as a newcomer to schools.

4. Content and added value of SBD to date

Two years on, Gareth describes the SBD programme as having great added value for himself, the school and partnership activity. He sees it as an:

Amazing vehicle for getting understanding of the education sector...getting real and in-depth knowledge of how it works and the nuances of going beyond the day to day school business management.

He feels that SBD is: ‘...really well pitched at executive level and those looking at wider world’. From his continuing links with other graduates from his cohort Gareth feels that benefits have been experienced widely by those completing the programme. In particular he notes how many individuals have taken new, and often more senior posts, in schools or moving to local authorities, in the year or so after graduating.

Programme value: Gareth feels he has profited greatly from completing the SBD programme although the first half brought particular challenges. In particular, although in the first four-five months of the programme he felt he was participating at a disadvantage with others who were established in school management and usually with past professional development experience in the SBM role. By the mid-point of the programme he felt he had ‘caught up’ and now recognises himself as on a par with other graduates.

Even before the end of the programme, he felt that he was already benefiting in terms of his own improved theoretical understanding - not only of policy issues which had been a particular gain, but also in his own confidence. A particular benefit had been in adopting a more systematic approach to reflective practice and being able to apply this to day to day circumstances in the school.

Programme design and delivery: In general Gareth welcomed the SBD focus on blended delivery. He felt that particular strengths of the programme had been:

- The opportunity to network formally (in face-to-face sessions), and informally (out of NCTL and post-participation) with seasoned SBMs and in the group work at Nottingham, reducing his (then) sense of isolation. This also provided important outputs especially for Academy conversion where he has been able to liaise by email with others a little further ahead in conversion on, for example, health and safety autonomy and insurance implications.
- The ability to customise some of the programme activity and focus through projects and assignments. This has included Belleville’s early engagement with the teaching school concept and the development of the Alliance structures.
- The opportunity to construct and develop a research assignment (and presentation), and to have the chance to customise this to particular development issues at Belleville - in this case on: ‘School meals, academy status and nutrition standards’.
- Face-to-face taught sessions at NCTL and structured group work where he felt that these were consistently good and a highlight of participation: ‘Whenever we got together it was inspiring...very useful indeed’.

Gareth added that the NCTL workshops had helped in particular through an ability to:
...contextualise things and put it into systems leadership perspectives...it (helped to) fast track understanding of what might otherwise take a long time to get to grips with.

Programme overview: Looking back on the programme, Gareth felt he sensed he had got a lot simply from the need to undertake extensive background reading around relevant issues. He has also gained a great deal from the opportunities provided from networking with other participants to engage with experience in other schools, and especially from the SBDs from London schools on the cohort. Here there had been several informal out of NCTL meetings of participants and from which he saw:

...lots of different people going through lots of different challenges and change. This meant we had lots of mutual issues and experience to share just through informal networking.

Gareth concluded that while: 'The course was really, really useful', the intensity remained a challenge not only for meeting its demands but also for making best use of the knowledge gained:

I feel there is still potential to get even more from it - especially if the programme could free up some time for participants to reflect on and draw on knowledge gained.

These challenges centred especially on the first half of the programme. In that phase he had found it difficult to anticipate the demands of the programme and felt at the time that course and module leaders did not provide sufficient information, early enough, to help participants plan ahead to accommodate the demands of juggling the course with their demanding 'day jobs'. Mid programme he noted that it was dispiriting to have just tackled three 5,000 word projects and papers (against a background of 50 and 60 hour working weeks) and then being almost immediately faced with equally daunting challenges for the next two or three months.

He felt that earlier forewarning of what was expected across the programme would have been possible and would have helped participants better accommodate the intensity and demands. A particular issue was that while Phase 1 of the programme provided a route map for the programme, this left grey areas to be defined later and an impression that for tutors: '...they were making up content for parts of the next phase as they went along'. To cope with this, mid programme he put together his own course map which proved very effective in anticipating how pressures would fall in Phase 2:

It meant I was seeing gaps before they became bigger gaps. It proved pretty accurate...I did not have to change much and hit all my deadlines. It meant that unlike the first part, the second half (of the programme) did not feel too pressured.

He added:

...by self-organising around this it gave me all the structure I needed...it reduced my doubts and concerns about what was coming up and how to cope with it.

Programme improvements: Gareth consequently felt that for him this had been a programme of two-halves. He welcomed later proposals by NCTL (towards the end of the second cohort programme) that a comprehensive map of the whole content, timing and sequencing of assignments across phases would help individuals plan their wider commitments. He saw few specific weaknesses to the programme content and felt that elective modules were strong on breadth and currency, with consistently good background papers, but noted that:

- Elective modules varied considerably in depth, and he felt that 'Innovation and Creativity' was relatively light on content compared to some others. This placed greater demands on him for reading.
- There had been mixed experiences for on-line support including in finding appropriate resources where some documents were archived very quickly, making it often difficult to find resources. However, resource quality - when located - was generally excellent.
- Support to modules was also variable, and notably for the 'professional development' module which he had found challenging. Here, he was initially failed, despite receiving very positive tutor feedback on the draft essay - although passed on appeal.
- There were wider problems with access to materials which he also felt were more acute for someone new to NCTL and where navigating web-space was initially problematic. He had particular adjustment problems with working out conventions in the on-line space and distinction such as what was available on 'My Programme' and 'My Groups'. He was unable to address this but felt a central directory might help with finding resources.

Some of the referenced sources for further reading or follow-up were either not available on-line, out of date, or only accessible on a 'pay-as-you-go' basis - which was a consistent problem for where these were key reading.

Gareth was also conscious that, as with other graduates he knows, he had found the research project he undertook of continued value:

I quite often refer back to the research project that I did on school dinners - it's become a valuable source.

With this in mind, he feels it would be useful if NCTL or tutors emphasised to participants that they would benefit most from their research projects if it was closely related to their role or to wider school needs.

Overall, Gareth saw the intensity of the programme as the main challenge for NCTL. He added that against the demands of a busy day job, and the on-line and access difficulties for some key resources, it was problematic to spend time searching for key sources that should be either easily retrieved or made available through a repository arrangement by NCTL, or to provide for alternative key sources.

5. Programme impact

Mid-way through the programme, Gareth was cautious about its early impacts for him, although he also felt that because he was new to the role securing benefits might take a little longer for him than others. At that time the main impact was on his personal development - and notably for building his understanding on wider educational policy.

There had also been some specific tactical gains from informal networking with other participants and better managing specific issues in the conversion to academy status (for which there had been no local parallels). He recognises great added-value to the continuing interchange with graduates from his cohort and this involves an informal group meeting of six people at roughly six monthly intervals in the early evening supplemented with ad hoc informal networking through phone and e-mails.

As the programme progressed, and in particular with further informal networking, the contextualised assignments and also placement opportunities, Gareth saw more direct outcomes. These extended well beyond gains for his own personal development, and included:

- Achievement through the modules and background reading, and informal dialogue with participants, of a much greater understanding of governance issues in schools and in particular in collaborative circumstances. This had been a major benefit for his extensive contribution to the tender to the Borough to manage a second school, enabling him to explore appropriate approaches to governing within a partnership arrangement, and also to propose effective models for local involvement potential drawn from a knowledge of what was known about what worked well (and what did not). He attributes this wholly to his opportunity to undertake SBD.
- Knowledge development, and exchange, through participating in SBD has also greatly extended his understanding of schools' admissions arrangements and how it works, particularly on practical issues such as effective relationships with local authorities through to admissions - and informing the academy's development through securing views on better financial and other management practices well beyond their own context. External auditors to the Belleville Academy have reported that, in their experience, they have stronger financial management practices than the majority of academies, and this is thought to have been directly contributed to by the formal and informal aspects of the SBD programme.

- His confidence level is now much greater and this has come from what he sees as a fast track, resulting from what he has covered and done in the SBD programme, as well as the people (and their experience) that he has had the opportunity to mix with, and the shared experience and knowledge from the participant networks. He sees this simply as having: ‘...greatly compressed my learning curve’.

He sees his wider knowledge and confidence as having impacted directly on the professionalization of business management at the school, and its executive engagement. This has been reflected in a substantial widening of his remit at Belleville, and the opportunity to take greater advantage of academisation. He has also developed a central role in building the capacities and management for further expanding the school’s practice, including through federation. They are bidding to take on other schools and here Gareth’s systems leadership knowledge, and more of the SBD knowledge, would become highly relevant.

For Gareth, and ironically, this expanding school and academy role means he has had little chance to use his knowledge to inform and improve practices outside of Belleville, although this has also been affected by the limited numbers of Wandsworth schools that had become academies. However, he feels that he is now in a strong position to support others, and sees this as possibly being expressed through the Teaching School Alliance, and possibly specifically as a specialist leader in education.

School Business Director (SBD)/ Primary Partnership (PP) participant case study: Tracey Brown, Lutley Primary School

This integrated case study report is based upon the first follow-up telephone interview in October 2012 with the participant (three months after Tracey completed the programme), together with the initial face-to-face interviews conducted with the participant, with the Headteacher of Lutley Primary School and the Deputy Headteacher of Lapal Primary School in September 2011 (five months after the start of the SBD programme). It also draws upon the second and final follow-up telephone interview with Tracey in September 2013.

Summary: The SBD Programme

- There is a connection between confidence generated by involvement in the SBD programme and the opportunities provided through primary partnership (PP) funding.
- The SBD programme and the PP project are closely interlinked and seen by Tracey as *one and the same*. The SBD programme was seen as highly relevant to what she was working on in the partnership and in the moves toward the federation of two schools. Her greater confidence and wider knowledge gained from the programme supported the expansion of her role in working as part of the leadership team.
- The chance to personalise the programme by choosing the topic for assignments was important as it meant that the study was then relevant to the individual and their situation
- The SBD programme was seen as highly relevant to what she was working on in the partnership and the moves toward federation. This close match was the main reason for going straight into the SBD programme rather than completing the ADSBM first.
- The Headteacher recognised the value of the SBD programme to the school.
- Links with NCTL programmes remain strong with several members of the leadership teams and other staff at the two schools enrolled for programmes or supporting the work of NCTL.

- There may be value for participants who have completed the SBD in having advice on further study and by there being an exploration of the overlap between the SBD and the National Professional Qualification for Senior Leadership (NPQSL) to see if some form of credit transfer is possible.
- The next steps for Tracey are the SBM advocate role and playing a full part in the teaching schools project. An impact on other schools comes from these initiatives and particularly from her advocate role, which will involve working with several schools in the West Midlands.

Primary Partnership Funding

- During the development of the partnership between the two schools, the PP Funding helped to finance the role Tracey played at this time working in both schools.
- The Executive Headteacher of the two schools, which are now federated, commented prior to federation that: *'Tracey was seen as a key part of the (future) Executive Leadership team with a role in both schools. It has allowed me to concentrate on school improvement and teaching and learning'*.
- There has been a real focus on the move towards federation between the two schools. This move would have happened anyway, but the additional funding made it easier and quicker.
- On a wider scale, Tracey has tried to make the Dudley group aware of best value by making group purchases (eg purchasing an electronic communication systems for use by parents).
- Primary Partnership Funding gave the schools the capacity to support the transition to federation and thereby played a part in the Ofsted inspection grade of Lapal Primary School moving from 'Satisfactory' to 'Good'.

1. Participant and school background information

Lutley Primary: Key facts

Location: Lutley Primary School, Halesowen, West Midlands

Scope: Community Primary school

Age range: 5-11 years

Size: Approximately 600 pupils on roll

Other information: Lutley school is now in federation with Lapal Primary School with an Executive Headteacher and one joint governing body. Lapal is also a Community Primary school with approximately 300 pupils on roll. Lutley is described by Ofsted as Outstanding, while Lapal is now rated as Good.

School background: The main schools involved in the primary partnership initiative were Lutley and Lapal Primary Schools. Lutley Primary School is oversubscribed for pupil admissions, with a history of being a successful school. The headteacher, Jeannette was appointed in 2007 and is a National Leader of Education (NLE) and has supported academies in other areas including Essex and London. In 2008, Tracey was appointed as the school business manager (SBM) having previously been an office manager in Bromsgrove where she completed a CSBM. She had previously been working in a playgroup and as a teaching assistant before moving into school administration. At Lutley she completed the DSBM before moving onto the SBD, which she completed successfully in July 2012.

Since her appointment to Lutley, Tracey and Jeanette have worked together to turn a deficit budget around and have also sought to improve the whole financial situation of the school. This was largely achieved through looking at the staffing budget and carefully analysing costs including a high expenditure on supply teaching.

Lutley Primary School has an outstanding Ofsted grade, with the previous Ofsted Inspection of the school being completed in March 2010. Teaching, pupil achievement and leadership and management were all judged to be outstanding. The first move toward partnership between the two schools came when Jeannette was approached to take on responsibility for Lapal Primary, when the headteacher there resigned and the school governors were unable to appoint an appropriate candidate. Lapal had tried to find a new headteacher through normal recruitment procedures but had been unable to attract enough applicants and those that applied weren't seen as strong enough to carry the school forward.

Lapal is a 4-11 community primary school with 308 pupils on role. The move to partnership and then federation has had an impact at Lapal, based on the most recent Ofsted inspection report. The school has moved from a previous grade of Satisfactory and is now rated as good by Ofsted. Within the report published on 15 March 2013, all areas are rated as at least good, with pupil behaviour and safety rated as outstanding. Ofsted notes the current status of the school as follows:

The school has been federated since January 2012 with Lutley Primary School, with which it shares an Executive Headteacher, who is a national leader of excellence, governing body, school business manager and inclusion leader.

Leadership: Jeannette had just completed NCTL Local Leader in Education (LLE) programme. At the time of the first interview, the SBD participant Tracey believed Jeannette was acting as a system leader for the two schools. As part of the support for Lapal Primary, Tracey worked two half-days a week there at the time of the first interviews in September 2011.

Jo Turner started at Lapal School as deputy headteacher, a term before an Ofsted inspection in September 2009. The inspection report left lots of things for the school to address. Teaching and learning, pupil progress, leadership of the school were all significant areas. The 2009 Ofsted report recorded a satisfactory grade (Grade 3) for both overall effectiveness and capacity to improve. The previous inspection had also been satisfactory. Ofsted had been supportive of Jo Turner's initial involvement during verbal feedback. As she comments, 'they could see the things put in place' as a result of her appointment and made a carefully phrased reference to this in their report.

The partnership between the two schools was developed in consultation with parents. There were a few initial concerns that involvement with Lapal would mean extra demands on staff at Lutley and that standards there might drop. That has not been the case. Parents of both schools were asked about the establishment of a formal partnership between the schools, with one governing body responsible for both schools. The goal for this partnership to start in January 2012 was achieved.

Primary Partnership: At the time in 2011-2012, with the primary partnership funding coming to Lutley School, Tracey was paid entirely through Lutley, with a recruitment and retention allowance for the extra work involved in partnership. The headteacher's salary was funded through both schools. Budgets for 2011-2012 had been set with the support of the local authority to take account of the possible federation in January 2012. The local authority had fostered the partnership and encouraged the headteacher to work with Lapal Primary. Funding for the school has been fairly steady over recent years and Tracey has helped to generate additional income through external sources.

The Headteacher, supported by Tracey, has stabilised the budget by examining costs (eg removal of an expensive colour printer), employing Higher Level Teaching Assistants (HLTA) and covering planning time differently. Tracey went on to describe this process.

It's a more economical staffing structure...we've just changed the way we looked at the staffing. My salary was an increase in expenditure so I had to prove my worth in making cuts in general resources, in getting better value for money through the teaching staff, the most expensive part of the budget.

At Lutley, Tracey chaired the governor finance committee meetings; this group reported to the main governing body. If it were a budget-setting meeting, the headteacher would also be there, but generally as long as she was kept informed she didn't need to attend. Tracey has overseen building projects, including in summer 2011 a £112,000 development.

Before federation, Tracey was involved with the Lutley senior leadership team (SLT) but did not attend all meetings; the main focus being on teaching and learning. SLT comes to Tracey for advice and she is treated as a senior leader, attending SLT meetings where her presence is appropriate. At the time, the headteacher at Lutley and Lapal described her role as 'being in transition' as the two schools move towards federation:

Tracey is seen as a key part of the (future) Executive Leadership team with a role in both schools...(and) her current role and the PP funding have allowed her to work in both schools...Over three years (together) she has grown more and more strategic...looking to the future and to different models of leadership.

She added:

She's my right hand woman. It has allowed me to concentrate on school improvement and teaching and learning. I'm not mired down in the finance and business side; it's not my area of expertise.

Tracey's role at Lapal involved an increasing amount of responsibility for the budget as the partnership moved towards possible federation. The arrangements involved Tracey in liaising with the Lapal account manager; in Dudley the finance department of the local authority are referred to as accountants. They have a degree of independence although working for the authority and accountants would normally have responsibility for a group of schools, sending out reports, which Tracey could access online for the two schools.

In relation to the Lapal budget reports Tracey highlights issues arising and bring these to the attention of the headteacher. A problem had existed with the heating system at the school and as this was part of her responsibilities, Tracey became involved in seeking solutions to the problem. She managed to secure £100,000 to fund new boilers for Lapal by contacting the local authority to look at the system there. The need was for a whole new boiler house rather than replacing an individual boiler and the matter had become urgent. The school committed £20,000 of its money with the local authority providing the remaining £100,000; a replacement boiler alone would have cost £40,000.

Tracey takes on a lot of the work in managing such improvement and refurbishment projects and this allows the headteacher to focus on teaching and learning. In 2011, Tracey worked with both schools and reported to Jeannette and both chairs of governors. At Lapal Primary School before federation the SLT consisted of the headteacher, Jeannette with the deputy headteacher, Jo, together with two senior leaders and two middle leaders. Tracey supported the headteacher and deputy directly. Jo reported:

It's been great to have Tracey as we can't afford a school business manager because of the size of the school. Accessing her expertise and using it across both schools has been brilliant.

In 2011 before federation, Tracey's role had already become more strategic and proactive rather than responding to everyday crises. The headteacher commented on this negotiated role setting and growing responsibilities, and described how Tracey was becoming more autonomous.

Tracey has had responsibility for researching a number of projects for the two schools. In the area of external funding Tracey reported that the school had received £11,000 from a Sustrans grant for two cycle sheds to be built out of recyclable, reusable materials. This has had a positive impact on the number of pupils cycling to school and Tracey had responsibility for monitoring this. The school also applied for solar panels and were being surveyed for this at the time of the initial interviews.

By October 2012 the partnership was focussed on the two schools, Lapal and Lutley. There had been no Ofsted inspections of either school in the intervening period. The two schools have now been in close federated partnership since January 2012, with one governing body for the two schools. The two schools have kept separate budgets for financial reasons because they receive additional funding as a result. The management structure(s) are:

- One Executive Headteacher (Jeanette) for the two federated schools.
- A Head of School at each of the two schools.
- Inclusion manager across the Federation
- Assistant Head of School at both schools

- A Federation Leadership Team (FLT), together with separate Senior Leadership Teams at each school.

The FLT has five members; the Executive Headteacher, the two school Headteachers, Tracey as Federation Business Manager, and the Inclusion Manager, who works with the SENCO in both schools. The SLT in each school consists of the School Headteacher, the Assistant Headteacher, the Federation Business Manager and the Executive Headteacher. Tracey reports to the Executive Headteacher and to both Headteachers of School and now has a Federation Assistant to support her with building projects and finance across the federation, focusing on buildings and health & safety at Lapal School. Lutley School has also applied for teaching school status and have had their building capacity grant this year. The Federation Assistant is also a Teaching School Assistant helping with the administrative side of being a teaching school. The final proposal is to be submitted in September 2013 with a final decision on teaching school status anticipated in March 2014.

Wider links with NCTL: The two schools have extensive links with NCTL. Jeannette is now a National Leader in Education (NLE), and the Head of School at Lutley recently completed the Associate Headteachers Certificate. Tracey did her first SBD assignment on the NLE and LLE initiatives and recognised the importance of system leadership through partnership and federation in these roles. There is a Specialist Leader of Education (SLE) at each school and Tracey is connected with the SBM programmes, having been appointed as an Advocate for the West Midlands. The federation assistant has recently registered for the DSBM. A few of the SLT members have also completed the Middle Leadership Programmes. An Assistant Headteacher is currently completing the National Professional Qualification in Senior Leadership (NPQSL).

2. Primary Partnership scope and context

The PP funding was used for 'back-fill' to replace Tracey going out of school and working across the two schools, and also for the increase in salary by her going up the scale because of the extra responsibility. This meant that her colleagues had the chance to take more responsibility, building expertise (and capacity) and with benefits in terms of succession planning. Without the funding, Tracey had supported the Headteacher but had not been in a position to spend time at Lapal.

The schools had a clear view of their proposed way forward in partnership before the PP funding was sought. The previous CSBM and DSBM programmes had helped to prepare Tracey for this role, although she was aware of the different models of leadership through the National College. However she stated:

I don't think I would have been prepared and had the wider background knowledge to do it...(there is) the confidence as well, even through just starting the SBD programme. I am meeting other people who are not just working at two schools, but at much more than that.

In relation to partnership Tracey was able to outline her longer-term vision for the schools and community of Halesowen:

My long-term vision is to see a family of schools in Halesowen, made up of academies, chains or federations of schools.

The PP funding of £15,000 started in January 2011, and with the federation of the two schools, the timing has been ideal in helping with the preparatory activity for federation. It has also supported Tracey in external networking, and with a colleague from another school, Tracey has set up a local group of school business managers for all working in that role in Dudley. Indeed the Executive Headteacher, the heads of the two schools and Tracey as Federation Business Manager work with a number of schools in Halesowen.

A particular focus for the group of School Business Managers has been on securing best value and early on the group were discussing how goods and services could be bought from outside the local authority. This has progressed to action and while schools still buy into some services from the authority (eg absence insurance and the catering service) others are variously sourced externally. Tracey is involved in getting best value for all schools in the group of around 80 schools (eg purchasing an electronic communication and on-line payment system). Such best value approaches often start with the two schools in federation and then are extended to others in the wider group.

These developments and aspiration have come together with SBD participation and the PP award working together. Although the move towards federation would have happened without the PP funding, this has acted as an enabler and made progress easier and quicker. As the Executive Headteacher pointed out:

The funding has allowed us to put the proposal for federation to governors and staff more smoothly, because nobody is at a loss over the plans.

The federation: Tracey was involved in planning the federation in detail and also involved with the formal aspect of partnership. The key priority for the current leadership is the pupils and the teaching and learning '*always top and always will be!*'. The impetus is to spread outstanding practice from Lutley through supporting Lapal Primary. Tracey explained how she has used the SBD programme with this priority in mind:

That's why I did my (SBD) assignment on the NLE/LLE programme. I want to know what can have the biggest impact on pupil attainment in giving all of the pupils in the country the best start in life.

Tracey's role is seen as one whereby she releases the Headteacher, Jeannette to focus on teaching and learning, to help her to do what she is really good at:

It's about distributed leadership, with everyone having their role within the system. It's also about finding the money within the budget to buy the equipment (to support teaching and learning).

From the start the then Deputy at Lapal, Jo also benefitted similarly especially in being released from focusing on finance and buildings.

On the administration side at Lapal, Tracey has been able to come in and work with the two office staff members and share good practice. The Lapal staff were able to visit Lutley and shadow staff there and Tracey has also looked at their duties and allocated these more fairly across the office with Jo observing of Tracey:

She has started to put auditing systems in place that hadn't been there. She has been able to ensure these are embedded. She has met with the (Dudley LA) accountant and does budget monitoring for us.

The SBD programme and the PP project are closely interlinked, with the SBD programme seen as highly relevant for the (then) move toward federation. This close match was the main reason for going straight into the SBD programme rather than completing the ADSBM first, with Tracey reflecting:

It was so relevant to the role, the school and everything we are now doing. The higher level gave me that recognition among the leadership teams within schools.

The synergies between the PP award and the SBD participation go wider than these two schools. The Headteacher indicated how the PP funding was helping other schools as well as Lutley and Lapal, noting:

As a township group, we know we've got to work closely to fill the gaps left by the diminishing role of the LA. It's trying to pool our resources. However it tended to be our school that was supplementing others ... whereas now we have a mechanism whereby I can release Tracey to help across the network.

She also was aware of the possible longer-term position.

With an eye to the future, it's trying to set up a system that will be sustainable (after PP funding). Maybe other primaries will be happy to buy in and pay for Tracey's time because they can see the value for money that it affords.

The PP funding was originally for four schools. The federation is for Lapal and Lutley only. However there has been a wider impact across schools locally including through Tracey's SBM Advocate role and in the Dudley SBM group where she is able to promote best practice across many more schools.

The four schools still work closely at Headteacher level and the next move is likely to be connected with the Teaching School initiative. A proposal has been submitted and there are partners established in all the intended areas, with neighbouring schools able to provide what would be harder from the Lutley and Lapal federation on its own. Initially this aims include to support, train and provide Newly Qualified Teachers for local schools and to provide on-going training for School Business Managers by promoting the National College courses.

The wider role was not planned at the start of the SBD programme but has evolved over time. A change since September 2012 has been the extension of activity supporting other schools. This started with the federation schools and then extended a loose partnership with other schools in Halesowen and beyond. The teaching school bid is part of this development and will promote alliances with schools outside the immediate area.

The SBD was very relevant to wider, more diverse settings and the schools' journey to federation linked well with the programme.

I would have found the SBD more difficult if I had been in a single setting, because you don't face the same sort of challenges and have to imagine what it would be like. Going on that journey to federation...meant there were lots of challenges but lots of opportunities as well. You would have had to think of things differently if in a single setting...what would it be like if?

The PP funding gave the schools the incentive, the catalyst to work together towards federation. This has helped Lapal to move from satisfactory to good. This is recognised as a significant objective measure of improvement. The networking across Halesowen has helped to change the way people think. This has been a gradual change but it does have an impact on several schools.

3. Opinion of the SBD programme

The SBD programme with a focus on system leadership was clearly thought to have synergy with what was happening in the two schools. The SBD is more strategic and involves working across a range of settings. In comparison CSBM is seen as more practical, more operational.

The surprise was how hard the SBD programme had turned out to be, but also how much Tracey had already known from doing her current job at Lutley and Lapal schools. At the beginning Tracey may have lacked in confidence; initially the SBD programme was seen (by Tracey) as intimidating. She commented when first interviewed in 2011 that:

The SBD scared me...the people on the programme. When I first went, I thought I wasn't up to scratch. A lot of people there are doing these fantastic jobs and I am just working at two little primary schools.

Tracey came to terms with the programme, recognising her role as being just as valuable as that of others on the programme, but the adjustment to the academic side of the SBD programme was also a challenge. However, mid-way through the programme (at the first interview) she was not looking beyond the SBD qualification to Master's (M) level and was focused on being able to complete what she saw as a highly demanding programme: 'If I survive this, that'll do me'.

Much of her pre-SBD knowledge had been gained through participation in the CSBM and DSBM and through practice, and had enabled her to, for example:

- Introduce performance management for the administration staff.
- Contribute to marketing and communication developments including an input in the design of the prospectus for the school.
- Produce financial benchmarking reports using budgetary information from the authority to set out comparisons with other similar schools for governors and the finance committees of both schools.

At the end of the programme she was able to recognise her own expertise in certain areas such as the above and this had helped her to grow in confidence. She began to feel more proficient and to build up networks of colleagues working in similar settings and in more complex settings across as many as *ten or twelve* schools. She was able to recognise that she could ask others for support as well as providing others with advice. It helps since in her role she often works alone unlike teachers in a large school where in the next classroom there will be someone doing the same or very similar job. The only contacts are people in other schools, but even then they may be doing a different job because of the setting.

The more people you can meet in a similar setting it helps you carry out your job better.

Tracey's expectations of improvement from SBD programme were specifically in helping consolidate this knowledge, and also to expand her strategic business management knowledge and understanding. This is seen to cross-over the distinction between teaching and non-teaching developments with the Headteacher commenting:

I would see Tracey (now) being more involved with the teaching and learning side of things. She has had to develop rapidly an understanding of the teaching and learning issue at the heart of it...and (here) I can see the impact of what she is doing.

The SBD Programme had proved to be exhausting. However the possibility of taking the NPQSL was now a consideration; it would be helpful to see the similarities and differences between this programme and the SBD and whether it might prove possible to gain both qualifications. Tracey commented that with NPQSL you would be able to apply for senior leadership posts on school. She thought that NPQSL and SBD were at a similar level and a process of credit transfer might lessen the workload to gain both. Both of these are fairly new programmes

It would be useful to know because NPQSL is more recognised in schools. Although this is not an issue here (in her present post), it can be in other schools.

4. Content and added value of SBD to date

Tracey greatly valued the programme, which she started in May 2011, completing almost a year later. She felt early on that this second cohort had profited from changes introduced after the first. However, she saw some confusion even after she has started SBD about what was expected and when, commenting at mid-point:

The course is still new and undergoing development. That means that it is not always clear what you have to do. I thought we had to undertake the HEI elective; I thought it was compulsory...and it's not, which was a relief. That became clear last week when my coach let me know.

Through the programme she felt she had very good support from the coach, commenting mid-programme that: 'she is aware that I am lacking in confidence and tries to gee me along a bit'. Tutor support was described as great overall:

I felt I had tremendous support from my tutor and couldn't fault her at all. She really helped me. She knew where my weaknesses were;...talked me through (and) that and helped me.

Other strengths of the programme were the way: 'it was extremely strategic'. Looking back at the SBD programme, she now thinks that:

Of any qualification the SBD is probably the most beneficial thing that I've done. I think you need to be doing a role relevant to the programme, so you can tie it in to your role. If you were doing an ordinary SBM role it would be more difficult to apply strategic thinking. In more complex settings, an academy, academy chain or a federation of schools for example the programme does apply. You need to be able to apply theory to your setting, your place of work.

In the final interview looking back on the programme Tracey commented on the widespread recognition of the SBD through the link with the National College. However she had seen the benefit of the programme at the end when it all came together. When working through the programme it could appear a little disjointed. These features were of course both a strength and a weakness of the programme. Tracey recognised that some of the disjointedness may be due to the fact that this was only the second cohort for SBD

The main area of greater theoretical understanding initially came in the area of the topic chosen for the assignment, ie the NLE/LLE programme. Tracey was able to discuss the longer-term implications of this programme and the links with teaching schools, specialist leaders of education and other wider programmes. The potential to support new Headteachers and teachers in failing schools through these initiatives was recognised. For example, she stressed that new Headteachers need a support programme through a coaching or mentoring approach. Such support could be through a LLE who have coaching others as one of their main roles. She also considers that she has developed a better strategic overview and thinks more like a leader now, for example in considering how to future proof (a project) and how to look at the overall picture.

Another strength of the programme is the network opportunities and also the residential events where external speakers were often thought to be inspirational.

The main challenges of participation are seen as:

- Survival - specifically in meeting programme deadlines in the face of combining professional (day-job) commitments, demanding roles with participants often doing the programme often involved in management and transformation and often in more than one school, and personal and family life: 'It's really high pressured when you are doing a job as well'.
- Time pressure - and where being on the programme can be very time consuming and especially when: 'You are trying to gain support and get advice and may have to wait for this to happen before you can progress'.
- Difficulties of access and obtaining information on a topic and where the on-line support was found to be wanting. Here Tracey gave the example of her NLE/LLE assignment where she sought advice on international practice:

I didn't get any advice. Eventually I found something on coaching school principals in the USA. That's all I found. It's hard to support your argument. I had asked others because I found it difficult.

Group WebEx meetings were found especially challenging in her personal circumstances. Tracey noted that at home it is not easy to find a quiet place for such discussions, and that others must also have found this difficult, especially at the usual time of 7 pm. There can be difficulties in getting online and linked up at a time of the evening when the house is usually busy. She felt overall that WebEx sessions were a great challenge whereas networking by writing online and getting feedback from others was seen to have worked well. Now she works as an SBM advocate she still doesn't like them! She prefers talking to people face-to-face rather than the awkwardness of WebEx when it is difficult to know when to speak. By comparison she preferred using the online forum where you can edit your contribution but: 'You can't edit a WebEx!'

The assessment of her work by tutors was seen as encouraging in that she achieved good grades. 'I got good passes for everything except the research and that was rushed because of the pressure of work'. She didn't think the assessment was well structured because there were overlapping deadlines.

Another difficult aspect of the programme was the challenge of presenting with a group of other participants at the residential events. It is a time-limited (one hour) task with a group of people who you have just met. It is different presenting to groups of parents on the possible federation of the two schools, because this is something that Tracey is far more confident about as she is well prepared, sure of her facts and working with colleagues.

Tracey's ability to overcome some of these difficulties was motivated also by seeing early added value from participation, and in particular payback for the conversion to federated status and in the experience of working in a federated system. As the Headteacher explained in September 2011:

It's made her very 'now'. We talk on a more strategic level...(she) is more up on new initiatives at the minute and brings this into meetings with colleagues.

Tracey completed the SBD programme in July 2012. The content of the programme met and probably exceeded her expectation, but proved harder than expected. The blended approach had worked well but some aspects had proved challenging and forced her into other ways of learning particularly in respect of presenting to other course members:

On the face-to-face days there were always times when we had to present things. I really didn't like it. However, it's useful as it puts you into a situation where you feel uncomfortable.

Tracey concludes that she would recommend the programme to anyone in a similar role but cautioned:

I would never underestimate how hard it is. We did feedback for Phase 3 participants. We had just done our last face-to-face and completed our seminars. We must have looked very exhausted and very relieved at the same time. Our faces must have spoken volumes that afternoon; we all looked relieved and very happy. We said it was probably the most difficult thing we had ever done. There were people there who had done Honours Degrees and they had said the same.

Added value had come from the significant change in the way she works more wisely and sees the bigger picture. 'I now think about the wider community and children in other schools'.

The programme has been made more structured because account had been taken of feedback from participants.

5. Programme Impact

The SBM programme helped to give Tracey greater confidence both in a strategic development role and in working across a federated arrangement and in wider partnerships. This impact on confidence is not entirely due to the SBD programme, as it is closely connected with the extension of Tracey's role as federation approached. Throughout there was a corresponding increase in others' views that she can do the role required of her. The increase in her self-belief and others' belief in her has helped in the expansion of her role within the federation. That expansion has grown in her links with other schools after the programme was completed. It can also be seen in the way that Tracey had applied for the advocate role as a result of her gaining confidence through completing the SBD.

The SBD experience has also transformed her approach to partnership and collaborative development. She feels she is now more aware of how at first colleagues may feel threatened by change and indeed scared of her. As a result she has approached them in a gentle way. This has also built on the DSBM, where she completed a module on change management and had earlier gained relevant experience in previous employment.

There is recognition of the current and potential value of Tracey's work to other schools. In the early stages this was on an informal basis. Jo gave an example of how she had advised another Headteacher to contact Tracey to find out how things were tackled in the two schools. Given two years with the federation in full swing, the Headteacher predicted that Tracey will have an even better understanding of how working across two schools can save money through efficiencies. There is also the awareness that this could be an income generator and that smaller schools would want to secure Tracey's knowledge and expertise. As the Headteacher commented:

We want to generate income for our federation as well, so we can afford to have enough posts out of the classroom to support teachers.

The Headteacher concluded her early interview by saying:

I am really proud of her for doing the SBD. It's been a benefit to her and to the schools and has come at the right time for us.

Tracey has become heavily involved in the process of change management, with the significant changes in federation occurring midway through her SBD programme. These changes in organisational structure have provided greater opportunity to think things through strategically with 'dedicated time to discuss the way forward'. She has had consistent views on the implementation of change, recognising the importance of getting everyone involved and on board with change. She has always seen teaching and learning as the first priority recognising the value of impact in this key area.

The impact of the PP came in terms of securing the partnership between the two schools and thereby helping Lapal School to move from satisfactory to good. This represented long term sustained school improvement that may well not have occurred without the PP. *'We are now focussed on improvement in other schools. It's not just down to the PP and the SBD. However we wouldn't have had the capacity without the PP.'*

There is an impact in terms of the budget and potential and actual cost savings. An example noted earlier in this case study was the negotiated Dudley price from an communication and on-line payment system. There is also an impact in the way in which the Executive Headteacher can be freed to concentrate on one school or the other; at the moment with Ofsted imminent it is important for her to be able to spend time at Lapal rather than Lutley.

Being able to make those changes in the leadership team has been really significant for both the schools...having a healthy budget in both schools and having the staffing in place.

The next steps for Tracey are the advocate role and playing a full part in the teaching schools project. An impact on other schools comes from these initiatives and particularly from her Advocate role, which will involve working with several schools in the West Midlands. This advocacy work and the potential of the Teaching School project provide opportunities for working with other schools. She has no plans to do further M level study at the moment, but feels that advice in this area for former participants from the National College might be useful.

School Business Director (SBD)/ Primary Partnership (PP) participant case study: Sheila Tibbenham, Cluster Manager, Whitley Excellence Cluster, Reading

This is the integrated case study of the September 2011 interview (five months after start), followed up in October 2012 (six months after completion) together with a final telephone interview with the Chair of the Cluster (September 2013).

The first visit involved face to face interviews with the SBD participant, the Chair of the Cluster, and a second Headteacher, and also attending a meeting of the full cluster. The October 2012 first follow-up discussion involved a semi-structured telephone interview with the participant. Both sets of interviews - and the first case study write up - were verified with the participant. The Chair of the Cluster validated the final case study.

Summary: The SBD Programme

- The SBD programme had an impact on participant confidence and also on her knowledge of current policy and the 'bigger picture' within which to place specific teaching and non-teaching issues of school improvement.
- The most positive feature of the SBD Programme were the inter-participant networking, as well as the opportunity and time to look at policy documents, to discuss wider issues of strategy.
- Other strengths of the programme are seen as the way in which it challenged participant thinking and current practice on the business side of the role. It had helped her to take her practice to a higher level, through improvements in theoretical knowledge. Examples identified were the '*principles of being strategic and the economics of delivering a service*'.
- A concern was expressed about the balance in some sessions where more time could have been spent in group-discussion rather than tutor-led input.
- The SBD programme had an empowering impact on Sheila's role as cluster manager. For example, she had reported to the WEC Partnership through an evaluation/review of the Children's Action Team. The paper looking at cost savings was also shared more widely across Reading schools.

Primary Partnership Funding

- Primary Partnership (PP) funding enabled the Whitley Excellence Cluster to maintain the existing role of cluster manager for one year 2011-2012.
- A major impact was that at the end of the funding period, the cluster decided to maintain the SBM post and establish it on a self-funded basis, despite the fact that the SBD participant was then known to be leaving her post in November 2012.
- Formal inter-cluster working arrangements were established including regular six-weekly meetings of bursars/business managers in all schools in the cluster. These have continued with the change of WEC Manager.
- There was a systematic dialogue between business managers within the cluster in relation to procurement and this is expected to extend now to collaborative training, joint site control/facilities management and collaborative administrative support across the cluster, with smaller schools being able to draw on the resources of the larger schools.
- The value of an SBD was seen to depend on the fund raising ability of the individual and saving in Headteacher time, and while difficult to quantify, these are possibly greater for a cluster than for individual schools.

1. Participant and school background information

Whitley Excellence Cluster: Key facts

Location: Reading, Berkshire (all schools)

- Geoffrey Field Junior School, George Palmer Primary School*, John Madejski Academy, Reading Girls School, Christ the King RC Primary, New Christ Church CE VA Primary School, The Ridgeway Primary School, Whitley Park Primary and Nursery School, Geoffrey Field Infant School, Blagdon Nursery and Children's Centre

Age range: 3-18 years

Size: Currently 9 schools

* September 2013: Renamed Palmer Academy and currently not a member of the Cluster.

The SBD participant Sheila Tibbenham was based at Geoffrey Field Junior School in Reading but worked for the Whitley Excellence Cluster (WEC). At the time of the first interviews in September 2011, the Headteacher of Geoffrey Field Junior School, Charlie Clare was Chair of the WEC. The Vice Chair of the Cluster was Ann Snowden, Headteacher of George Palmer Primary School. Sheila had been the SBM manager of WEC since 2006, coming from a diverse career including senior experience as a civil servant, working for Local Authorities and for the Centre for British Teaching (CfBT). The WEC position attracted her because it provided an opportunity to work closely with schools rather than managing at a distance '*...in a back room*' and in a much wider and more enjoyable range of activity.

The cluster was formed in 2003 when Excellence in Cities funding started and from which the partner schools applied for their own funding directly. The cluster therefore was in a position to appoint its own manager. It was recognised that the PP initiative was closely tied up with the work of the cluster and would give an opportunity for that work to continue despite the loss of other sources of funding. In June 2012, the cluster held a planning day facilitated by an external consultant. The outcome of that event was to keep the cluster manager post in order to co-ordinate the Cluster, even though Sheila left in mid-November 2012. The post was therefore retained and a successor to Sheila was appointed with all cluster schools co-funding the post, to be based at Geoffrey Field Junior School as before.

There were no changes in the membership of the cluster since the first visit in September 2011 until September 2013 when one school became an academy and withdrew from the cluster. The Headteacher of Geoffrey Field Junior School, Charlie Clare remains as Chair of the WEC. There was one change of Headteacher with a retirement in the summer of 2013; the new Headteacher will come from a school in West Reading outside the Cluster. The Geoffrey Field Junior School was last inspected in November 2008. The leadership of the school is graded as outstanding. Other schools in the cluster had a range of grades for overall effectiveness in 2011 including some as satisfactory, and at the time of the interview the report of the inspection at George Palmer School (Term 1, 2012-2013) was not published. In September 2012, the Chair of WEC had approached the National College with a view to his school becoming a teaching school. However the School took the decision to become a lead school on the School Direct Programme, working with other schools in the Reading area, not just within the cluster.

Schools in the cluster are based in a deprived area with challenging catchments and more specifically the Whitley district of Reading was described as:

- An area of high poverty, including wards (for some children's indices) in the lowest five per cent in the country.
- Very low proportions of school leavers entering Higher Education and a high proportion of young adults not in education, employment or training.

- A higher than average proportion of single parent families, social housing and generational poverty.

One Headteacher commented that his school had 33% free school meals (FSM) and that this was not the highest figure for schools in the cluster. They also noted that those parents that work are often in very low paid employment, with some situational poverty with people coming to the area from overseas or attending university and on very low incomes.

Sheila worked closely with the Chair of the Cluster (the Headteacher at the same school), who also acted for WEC as Sheila's 'line manager'. Sheila was not part of the senior leadership team (SLT) of any member school, although she was an integral member of the WEC Partnership. This consists of the Headteachers of all the schools or their nominees, including (in September 2011) a secondary school represented by its business manager (also an SBD graduate). There is also a Management committee, made up of the WEC Chair, Vice Chair and a secondary Headteacher, who meet prior to the Primary Partnership meeting. WEC accounts are held within the school and are strategically managed by the cluster manager. The new appointment to the SBD from November 2012 Pauline Hill has continued the main role of WEC Manager held by Sheila although there have been some changes to her detailed responsibilities.

As a group, the Headteachers were seen as passionate about working together, but are also very busy people running their own schools. Due to these commitments, they knew that they wouldn't individually be able to make the cluster co-operate with sufficient intensity and needed a cohesive individual who:

Oversaw the work of all the schools and who could pull everything together, keep a management eye on the costings, the projects, not let anyone go off at a tangent, keeping an eye on the core priorities and being clear what was down to the individual schools and not part of the cluster working.

In September 2011, in her new role and with business manager training, Sheila liaised more closely with the schools' own independently appointed business managers, and facilitated the meetings of both the Headteachers and school business managers.

Wider links with the National College: As well as Sheila, and a fellow participant in the SBD programme, other business managers have been involved with SBM programmes of the National College. The Cluster Chair is also a National Leader of Education (NLE), whilst two other Headteachers are Local Leaders of Education (LLE).

Since completing the SBD, Sheila has not been involved in further National College activity. Since November 2012 she has supported a school in providing input on becoming an academy. She is currently an Assistant Bursar at a school in Suffolk, where she now lives.

2. Primary Partnership scope and context

The Primary Partnership initiative is closely tied up with the work of the cluster and has given an opportunity for that work to continue despite the loss of other sources of funding. One of the Headteachers described the timing of this change as:

It was sensible, but wonderful serendipity. The cluster had just lost its funding after three tranches of Excellence Cluster (over)...nearly nine years...it was useful to shift Sheila's role to one having a handle on the procurement of money and how we generate money. This tied in perfectly with the PP initiative and with Sheila's SBD participation.

Sheila described the role played by PP funding as:

The PP funding has enabled the schools to carry on what they recognised as a really useful post. Without [NCTL] funding the post would not be there for this year (2011-2012).

The role also involved raising the profile of the cluster, liaising with a Wokingham cluster of schools to set up a parallel Service Level Agreement. She also represented the Cluster at other meetings, including Aim Higher and Thriving Neighbourhoods. Beyond wider external roles, Sheila's contact with individual member schools was usually through the Headteacher but if it was a business issue she would go to the bursar. Against the background of the limited duration of the PP funding, a particular focus has been demonstrating value with a stronger focus on raising funds, and generating business opportunities for the cluster:

We are constantly looking for ways to raise our profile, but now it is also for the purpose of being able to sell our services.

Sheila has helped to organise the Cluster Service Level Agreement (SLA), which includes training conducted by individual Headteachers, and which will bring in funding for their schools, and the cluster.

Sheila sees the key themes for the cluster now in terms of a number of interlinked elements:

- The supportive element - Headteachers being open and honest in a trusting, collaborative environment.
- The PP funding allowing the cluster to carry on being innovative and move forward at a time of huge change in education.
- Supporting schools to become businesses, offering service against an ever changing national scene.

At this time, they feel it is still useful to have a person coordinating the cluster to ensure that issues raised and suggestions proposed are dealt with efficiently, and Sheila noted:

It is hard for Headteachers to take the lead, because while the schools collaborate they are also in competition.

There is also a time element for Headteachers and actions identified from cluster management or executive meetings were often for the cluster manager to initiate. To this is added the fact that for the eight constituent primary schools, although they have their own business managers or bursars, they don't have the capacity to work strategically across the cluster. Sheila's role has given her the opportunity to analyse where she can add most cross-cutting value, be that through targeted improvement collaborations, commissioning or resource raising through writing funding bids and project proposals across the cluster. Sheila also facilitates a cluster wide pupil council, supported by a teacher from each school.

Working collaboratively with the individual SBMs is an important feature of the cluster manager role and where:

I have needed to be sensitive to the concerns of other SBMs within the cluster.

In this, it was noted by Headteachers that:

...she has done lots of one to one meetings with bursars in schools, which will help them come together.

In the past SBMs and bursars had focussed solely on working separately within their own schools, rather than as a team across the cluster. To build co-operation, Sheila completed a skills audit of SBMs and bursars across the cluster to help identify key areas for their collaboration. Pauline Hill continues this liaison role and hosts meetings for other business managers in the cluster. In 2012, themes emerging were commissioning, the need for help with bid writing, looking at joint bids across the cluster, and support to help SBMs' profile be raised within their own schools. Professional development has also been looked at for Business Managers within the cluster, but here the SBD programme as a possible option seems to not be preferred - most SBMs emphasising a preference to do an accounting course to widen their chance of employment in the current climate.

Part of Sheila's work in the PP activities had involved bidding for project funding; including for funding to continue the role of cluster manager. She has built up a basis to support any proposal and has also helped school business managers to generate their own personalised bids and thereby make the task of bidding for funding less onerous. The cluster is now seen as better focussed on finding new funding opportunities, some of which relate to the cluster charity Aspire2. An example cited was the fact that Comic Relief has a fund for local regeneration and community projects, with one Headteacher noting:

There's a lot of information out there and Sheila's role involves finding out what's available.

Within the PP activities, Sheila has developed a three-year business plan to take the individual schools and the cluster forward. This has identified priority areas for the cluster and a timeline for the implementation of actions to meet these priorities. The PP funding has also seen the work of the Excellence Cluster to continue during 2011-2012. It had enabled it to continue with a slightly different focus on the work of the coordinator in terms of business management. The decision to fund the role for a three-year period 2012-2015 had built upon what had happened before and during PP funding.

The constraints on the partnership were financial and it was an important opportunity to ensure that schools were aware of the value for money of their investment in the coordinating role of the School Business Manager. The role involves the coordination of extended services and also the fund-raising activities for the cluster charity.

In October 2012 it was considered that a key change facilitated by the Primary Partnership funding is the decision to continue the role (of cluster manager). Headteachers have to focus on their own school and don't have the capacity to manage the cluster. The role also entails a need to network with the local community for example in terms of the cluster charity, to be aware of what else is happening in the community and help to plug the gaps as necessary.

There have been changes to the role description with the new appointment. Part of Sheila's responsibilities has been taken away; these were concerned with hands-on input to holiday time activity for local children. Sheila had the role of organising events for children and families, which could be undertaken by someone at a lower level but is seen by many within the cluster as high priority. One Headteacher commented in 2011:

It's essential we enrich the lives of our children...those things around the school that make it attractive and make them want to come to school. If it wasn't for Sheila organising all that...it's quite a task. There are parents of children from ten different schools writing in to say they want their child to go on these weeks, coordination of all this, getting coaches booked, all the children there and the personnel to support them. We, as Heads, just wouldn't do it otherwise.

Another person has now been employed to fulfil that role. Pauline works term time only, which is another change; the other person is employed to deal with the holiday clubs and the residential activity. Pauline continues as clerk to the charitable arm 'Aspire2' of the cluster.

3. Opinion of the SBD Programme

Sheila completed the SBD programme successfully at the end of September 2012. She had to resubmit one module, as she had narrowly failed to achieve the pass grade. Her resubmission for this module was successful at the first attempt.

Sheila has found the SBD programme intensive, demanding and challenging. A particular feature was that her lack of experience in academic writing as required on the SBD. She had not completed the other SBM programmes, and does not have a degree, but did draw on previous work experience, which had given her opportunity to work in writing policy documents, involving the need to read critically and to be able to summarise arguments effectively.

However she regarded some aspects particularly valuable. It certainly aided Sheila's confidence to know that she was able to write at that level, and to meet colleagues undertaking a similar role.

It can be quite isolating unless you meet people doing the same thing. I am really pleased I did it, although it was hard work.

The main challenge was in finding the time to study. At the time of completing financial returns and forecasts in March/April, participants were completing two assignments at their busiest period.

Moreover, in talking with others on the programme, Sheila knew that many had faced challenges both at work and in their personal circumstances, but had come through successfully. She found coaching to be supportive adding:

My coach was lovely but she was more of a tutor than a coach. A coach would be more in contact and would visit me...to see how I work. We had time at a couple of the sessions in Nottingham to have a 1-1 discussion, but it was more of a tutor role. She was very supportive and constructive in her comments back on my essays. The assessment was fair and constructive.

A difference from other participants on the programme is that Sheila felt her role was to work alongside Business Managers in other schools. She had to proceed carefully not to make others feel threatened. She realised that at times of economic stress with jobs being lost, people may feel threatened and therefore not want to work collaboratively. Her role is very much a co-ordinating/facilitating role and therefore in her view quite different from other SBD participants. However, for Sheila a particularly positive feature of the SBD programme was the very useful networking with other colleagues and the time to look at policy documents, to discuss strategy and to work at that level.

4. Content and added value of SBD to date

The SBD programme was described as very interesting and Sheila felt lucky to have been on it. It was also felt to have significantly contributed to her job. The level of the programme seemed appropriate although on occasions during the face-to-face events it was thought to be worthwhile having had more in depth discussion/debate. In commenting in September 2011, Sheila felt that this approach may be more effective at the next such event in November (2011) as the participants will have got to know each other better. There had been little time to go on to the discussion pages on the National College website as the pressures of the 'day job' had taken precedence.

Sheila felt there were few weaknesses on the programme but did comment on the following:

- With the reciprocal visits she would have valued a wider choice - so as to choose somewhere more relevant to participants' day-to-day jobs rather than just going for a local visit.
- With regard to resources she indicated that access to these through the website had been confusing: 'It wasn't easy to access the material...it made it difficult and frustrating at times'. It was also felt to be confusing for participants if material given in the training manual is not used.
- While the SBD structure was seen as well conceived overall, at the time of the first interview it was felt that there was a need to improve the balance between tutor input and group work, with more time working in groups.
- Another issue for balance was that at times delivery seemed rushed and on other occasions there seemed to be a lot of time (to spare) in the session.

Placements were seen as particularly frustrating, with Sheila observing that:

Another business manager and I chose to go to a teaching school. They were paid for this, but it was a total disaster. The Headteacher was never free (and) they had signed up for the programme without knowing what was required of them.

Sheila had the same tutor throughout but in practice had not had to make much contact because of the available contacts locally. There is another SBD participant, the WEC Chair, who is a NLE, Linda Miller a local National College representative who acts in a mentoring capacity; all were all available to offer support and a forum for discussion. The tutor, Susan has a different role in that she informed Sheila where she was going wrong and offered guidance at that point. Sheila submitted drafts of sections of her assignment for advice. There have been improvements to Sheila's theoretical knowledge; in particular she identified the 'principles of being strategic and the economics of delivering a service'.

The main challenge for Sheila was that of finding enough time for the programme. The aim of joining the programme was to help her to do her job better rather than just gaining the qualification. It was therefore important for Sheila to focus on the cluster manager's role during the working week. Her time to study therefore was in the evenings and at weekends. A frustration was therefore the visit that Sheila made to a large secondary academy as part of the SBD programme. The difficulty is the time required to make such visits. Not having completed the CSBM, the DSBM or the ADSBM was initially a concern for Sheila but this was clarified in conversation with other participants who were able to describe how different the other programmes were to the SBD programme. The kinds of skills required within the programmes were ones that she had gained from her varied career. For Headteachers within the Cluster, there were 'no issues at all' related to Sheila's participation in the SBD programme. One commented that there was 'every confidence that the programme is refining Sheila's skills'.

In September 2011, there was recognition that the SBD programme provided a focus on strategic business management knowledge and understanding rather than the skills and their application. Sheila advised that it might be useful to consider marketing and communication strategies in the SBD. Quality assurance, monitoring and evaluation would be important to the cluster in future. The external speakers at the SBD events were seen as valuable. In particular the contribution from Professor Brent Davies of Hull University Business School was identified as being particularly useful. There were one or two instances elsewhere where the pace seemed to drop.

5. Programme impact

Sheila identified a number of specific impacts, which could be at least partly attributed to the SBD programme, and specifically:

- Raised confidence - and this had enhanced her contribution in cluster senior management throughout the programme.
- Knowledge of current policy - where she had undertaken more reading on current issues for example, on the impact of teaching schools and the issue of teaching styles. This was important because she felt that government are seeking more collaboration and the cluster needs to recognise and build on what works well.

Most recently, Sheila has been appointed as a Specialist Leader in Education (SLE) for school business management, which she sees as a direct consequence of her SBD experience and working within the cluster. However, when interviewed in 2012 she had not yet been deployed.

Schools don't really know what to do with us; my specialism is in working with clusters of schools. A lot of schools are still very concerned with teaching and learning and not looking at the more strategic business aspects of their school.

In September 2013 however the chair of the Cluster reported that since her departure from her post she had worked in supporting Battle Primary School, Reading which was an outreach school linked to a teaching school. There are currently no teaching schools in Reading.

For Sheila personally, the main impact of participation in the SBD programme was the growth in confidence. She was able to use information gained from studying national and international perspectives on leadership and collaborative working. This meant that she could effectively contribute to discussions within the cluster. The programme made a difference as:

It challenged my thinking and challenged my practice, making me think about the business side of the role and how it has taken me to a higher level. Writing at Master's level when I haven't studied for a degree has taken me out of my comfort zone.

Added value had therefore come from the increased confidence in her role and greater confidence in her prior knowledge, and this was crucial to working with Headteachers, which could be daunting. A particular issue was the confidence to put forward ideas but not to get upset if individual or collective Headteachers dismiss these:

You put forward suggestions and guidance but Headteachers have strong personalities and views. It is a case of 'managing upwards'.

The impact was recognised by her colleagues at the start of the SBD in 2011. As one Headteacher commented:

She has probably become more empowered to manage us...we are a pretty tough group to keep focused and get on with the business.

In September 2011, Sheila felt: 'Because I didn't go to University, this programme has given me an opportunity to accredit the experience I have'. She added:

The SBD has given me confidence and provided a focus to look at education, at the bigger picture rather being inward-facing. An example would be when we looked at academy chains, at federations...it also makes me look at research again...you are so busy I feel that it is important to link this to something you are doing practically.

In September 2011 this broader perspective was commented upon by one headteacher, who indicated that this was more evident now that Sheila was on the SBD programme. One feature of the research literature Sheila had been exploring was the international

perspective paralleling teaching schools, and looking at initiatives in other professional areas.

Sheila had been accessing material and reading around the topic in relation to her assignments and this had had a positive impact with schools because of her role as cluster manager. They had benefited from Sheila's involvement with the SBD programme as she reported to the WEC Partnership directly for example through an evaluation/review of the Children's Action Team. The paper prepared by Sheila, looking at cost savings, was not only shared with cluster headteachers but also more widely across Reading. Sheila had therefore been able to use her experience of the SBD training to bring examples of good practice from elsewhere to the cluster.

One potential impact was seen in the opportunities beginning to arise for work outside the cluster, possibly within other areas of Reading. It was considered feasible for the WEC to share their expertise and that of their cluster manager with others. One headteacher thought that the business of commissioning is still very new (a big mine-field) to local authorities and schools. In September 2011, it was noticeable that there is still some reluctance about Headteachers being commissioned and charging for their service. As one interviewee then commented:

...it's a completely new culture we are moving into. We've never had to think about things like that.

In September 2013 it was noted that within the Reading prospectus for continuing professional development (CPD) for schools there is a reference to the cluster website and to the work that is being done by WEC. Although some work has come, it is not as much as had been hoped.

The preparatory work that Sheila has done for her assignment on teaching schools was useful. In 2012, she felt that this could be the next step for the cluster and it would be valuable to consider how this initiative has progressed by the time of the final interviews. The judgement of Headteachers as to what is most effective may vary from that of the cluster business manager, but they clearly had a very similar understanding of what was needed by the children and a will to make this happen. As one noted:

Sheila is part of the cluster's vision and on a personal level is committed to that vision for the community.



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