



Department
for Education

Survey of school and trust business professionals

Research report

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Introduction

This report is based on a survey of 1,168 school business professionals in LA maintained schools, single academy trusts (SATs) and multi-academy trusts (MATs) and follows previous iterations of the School Business Professional¹ (SBP) survey run in 2019 and 2021. It specifically asks questions of financial leads as these individuals were best placed to address the variety of questions, especially those concerning financial and procurement practice. Altogether, the survey asked questions about respondents' skills and experience, and role in strategic planning and financial management, as well as exploring other aspects of procurement and the use of certain resource management tools and guidance. It will be of interest to all involved with resource management within schools and trusts as well as other stakeholder groups and representative bodies.

The five groups of interest referred to throughout this report are: Local Authority (LA) primary, LA secondary, Single Academy Trust (SAT) primary, SAT secondary and Multi-Academy Trust (MATs). Some survey questions for these groups were specific to the respondent personally (the 'financial lead' at an LA maintained school or trust), e.g., their qualifications or their involvement in strategic planning, other questions were focused on the school or trust operations or practice, e.g., 'how often does your school/trust benchmark its income?'. Text used in the report and/or titles of Figures and Tables make it clear where this is the case.

Multiple acronyms are used in this report either for brevity or to reflect a finding for a specific sub-group of respondents. These are:

- SBP – School and trust business professional
- DfE – Department for Education
- SRM – School Resource Management
- MAT - Multi-Academy Trust
- SAT - Single-Academy Trust
- LAMS – LA Maintained schools (i.e., LA primaries and LA secondaries as a group)
- Standalone schools – refers to LA primaries, LA secondaries, SAT primaries, and SAT secondaries as a group.
- Trusts – refers to both SATs and MATs as a group.

¹ The term School Business Professional (SBP) is used by the Department for Education (DfE) to acknowledge the wide range of practitioners within the profession, from office administrators in small schools, through business manager in larger secondary schools, to chief financial officers and chief operating officers in multi-academy trusts. This also extends to members of central teams with specialist skills such as human resources or procurement officers.

- Standalone primaries – refers to both SAT and LA maintained primary schools.
- Standalone secondaries – refers both SAT and LA maintained secondary schools.
- LA (P) – LA primary.
- LA (S) – LA secondary.
- SAT (P) – Single Academy Trust (primary).
- SAT (S) – Single Academy Trust (secondary).
- ICFP – Integrated Curriculum Financial Planning
- SFB – Schools Financial Benchmarking
- VMFI – View my Financial Insights

Findings from previous SBP surveys underpinned chapter one of the 2022 SRM Strategy² ('Supporting professionals to achieve effective SRM') and allowed the department to understand the use and influence of DfE SRM tools, services and guidance to subsequently improve the functionality of all based on different user need. This survey builds on those benefits and allows the department to assess the impact of the SRM programme in supporting SBPs, tracking utilisation of SRM tools, and highlight key differences in SBP characteristics, budget and resource management, and provision of services.

² [School Resource Management \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

Summary of the main findings

Chapter 1: Characteristics and intentions of financial leads in standalone schools and trusts

- Experience. The majority of financial leads for all phases and types of school/trust are experienced. Just under three-quarters have been a school business professional for 6 years or more, and most intend to stay in the profession.
- Qualifications. Eighty-five per cent of School Business Managers are qualified to at least Level 4, 58% to at least Level 5. Of those not qualified to Level 4, 51% have 6 or more years' experience, and of those not qualified to level 5 this was 68%.
- Eighty-three per cent of Chief Financial Officers were qualified to at least Level 6 and 71% to at least Level 7. Of those not qualified to level 6 or 7, the vast majority (94%) had 6 or more years' experience.
- A third of all respondents plan further study in next three years.
- Professional standards, professional membership and CPD. Respondents from trusts (i.e., SATs and MATs) are more likely to be a member of a professional body related to SBP work than those from LA maintained schools.
- Of the six SBP professional standards, confidence is highest in the operational leadership and finance aspects. As might be expected given the nature of the respondents (e.g., some very senior Chief Financial Officers in large MATs and other SBM in small primaries), confidence varies on the other four standards. This variability may reflect the usual responsibilities and areas of specialism associated with particular SBP roles and other SBPs in an institution having a more detailed understanding and/or responsibility for standards.
- Those respondents in the most senior SBP positions (i.e., CFO and COO in trusts) are spending more time a year on continued professional development than financial leads in less senior positions (e.g., SBM).

Chapter 2: Financial lead involvement in standalone school and trust operations

- An SBP is on the senior leadership team of a school / trust for most MATs and standalone secondary schools. Although they are usually on the SLT in primary schools, it is lower than for secondary, especially for LA schools. The (relatively) low LA primary figure (56%) is broadly consistent with previous 2019 (61%) and 2021 (56%) surveys which asked the same question.

- Most respondents are involved in 'some' or 'all' strategic planning, with financial leads in MATs having the greatest extent of involvement. A type of school difference emerges with financial leads at both SAT secondaries and SAT primaries having more involvement in planning than their LA counterparts.
- Capacity/workload, organisational culture, and lack of experience / knowledge of the curriculum were the three main reasons for not being involved in 'all' aspects of strategic planning.

Chapter 3: Budget management and resource management support

- Most MATs and standalone secondaries use ICFP. Approximately 1 in 5 MATs, 1 in 5 of both types of standalone secondaries, and 1 in 5 SAT primaries intend to use it in the next 12 months (compared to 8% of LA primaries).
- Those who do not use ICFP were asked why this was the case. Just under a third don't use ICFP as they didn't see it as applicable to their context; about a quarter weren't aware of it (made up of largely LA primaries), and a fifth didn't know (notably at LA maintained schools).
- The use of DfE SRM resources varies by phase and type of school, reflecting in part a staggered rollout of the resources and some programmes operating a peer-to-peer support model.
- Most LA maintained schools and trusts use the Schools Financial Benchmarking and find it useful. Its utility has increased in recent years with more using the tool (compared to 2021) to identify or reconsider areas for possible efficiency improvements, as part of strategic discussions, and to inform budget setting.
- Respondents have a positive view of the View My Financial Insights (VMFI) tool, with 8 in 10 seeing it as quite useful. It is being applied in the ways intended with an increasing proportion of LA maintained schools and trusts using it to support strategic discussions at senior leadership team and governing body levels, and to inform budget setting.

Chapter 4: The provision of functions and services within standalone schools (inc. procurement)

- Catering, payroll and legal are most likely to be 'completely outsourced' in both standalone primaries and secondaries. Human resources, school improvement services and finance support will tend to be 'partly outsourced' in both also.

Procurement will tend to be done in-house ('completed with school') by both types of standalone secondary and primary SATs. Most LA primaries will also undertake procurement within the school, but they are the group (of the five groups consistently reported) most likely to partly outsource it (26% of them do).

- Most respondents feel they are getting fair value, achieving the outcomes they want, and have confidence making buying decisions. However, some do not feel well informed about procurement regulations and feel they spend more time on procurement than they should.
- Both phases of standalone school will access procurement support from different support organisations as needed. LA primaries are more likely than SAT primaries to regularly (net 'often or always') access support from local authorities (42% vs. 15%). Around half of both types of primaries will never or rarely use a public sector buying organisation, another school/MAT and a local school business professional network.
- Whilst LA secondaries are most likely to regularly go to local authorities (32% net 'often or always'), SAT secondaries are less likely to do so as just over half 'never or rarely' go to them and will more regularly use a private company (15%) more regularly ('often or always'), public sector buying organisation (16%) or the Get Help Buying for Schools service (15%).

Chapter 5: The provision of services within MATs (inc. procurement)

- Finance support, human resources, school improvement services, procurement, and payroll will tend to be provided centrally from a top slice. Facilities management and catering do not tend to be provided centrally.
- Four areas - procurement, estate management, school improvement services, and human resources - will tend to be 'completely provided' by MAT central team staff (similar to the 2021 SBP survey). ICT support will tend to be 'partly outsourced' by the central MAT team as will facilities management and finance support. Legal, insurance, catering, and payroll tend to be completely outsourced (also similar to the 2021 SBP survey).
- Most feel they are getting fair value, achieving the outcomes they want, and have confidence making buying decisions.

Methodology (inc. sample, responses, and weighting)

IFF Research scripted and housed a 15 minute online survey on behalf of the department. Content was based on questions asked in the 2019 and 2021 school business professional surveys, with new additions reflecting emerging department evidence needs.

A stratified sampling process aimed to achieve as close to a representative sample as possible for each of the five main groups to generate statistically robust findings. Special schools, nurseries and alternative provision were not included.

Fieldwork took place between 15th June 2023 and 10th July 2023. Each school or trust had an individualised survey link specific for them meaning one response per standalone school or MAT. Responses were then linked by IFF Research to other Get Information About Schools variables on school (or trust) size, phase, type etc to inform grouping of responses and anonymised data analysis.

Invites to LA Maintained schools were sent to the primary contact held by the department in Get Information About Schools (GIAS) which tended to be a general school email address³ with a request the invite be forwarded to the school business professional who was the 'financial lead' at the school. These were sent by DfE staff from a project specific mailbox. Invites to trusts (i.e., SATs and MATs) were more targeted by virtue of the Academies Trust Handbook requirement that trusts⁴ provide the Education Skills Funding Agency (ESFA), and by association the department, with contact information for their chief financial officers. Invites to trusts were thus sent directly to these individuals, negating the need for invites to be forwarded.

Two email reminders encouraging completion were sent by DfE staff from the project mailbox in late June and early July 2023 leading to 1,168 responses: an overall response rate of 29%. Table 1 below breaks down responses and provides the weighting targets and profile.

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

³ For example, admin@myschool.co.uk, office@myschool.co.uk

⁴As per the Academies Trust Handbook, pg. 25 [Academy Trust Handbook 2023 \(publishing.service.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/100000/academy-trust-handbook-2023.pdf)

Table 1: Responses and weighting profile

Group	Number of survey completes	Completes percentage by phase of school or trust (will add up to 100% for each group)	Weighting targets	Weighted profile
SAT – Primary	127	36%	40%	40%
SAT - Secondary	199	56%	54%	54%
SAT – N/A (other)	30	8%	6%	6%
MAT – Mixed	167	42%	43%	43%
MAT – All primary	161	41%	37%	37%
MAT – All secondary	43	11%	13%	13%
MAT – N/A	25	6%	7%	7%
LA primary	277	67%	91%	91%
LA secondary	139	33%	9%	9%

Chapter 1: Characteristics and intentions of financial leads in standalone schools and trusts

This chapter focusses on the respondent (the 'financial lead'⁵): who they are, the extent of their experience their qualifications, whether they are members of any SBP related professional bodies and their future intentions.

Key points of chapter:

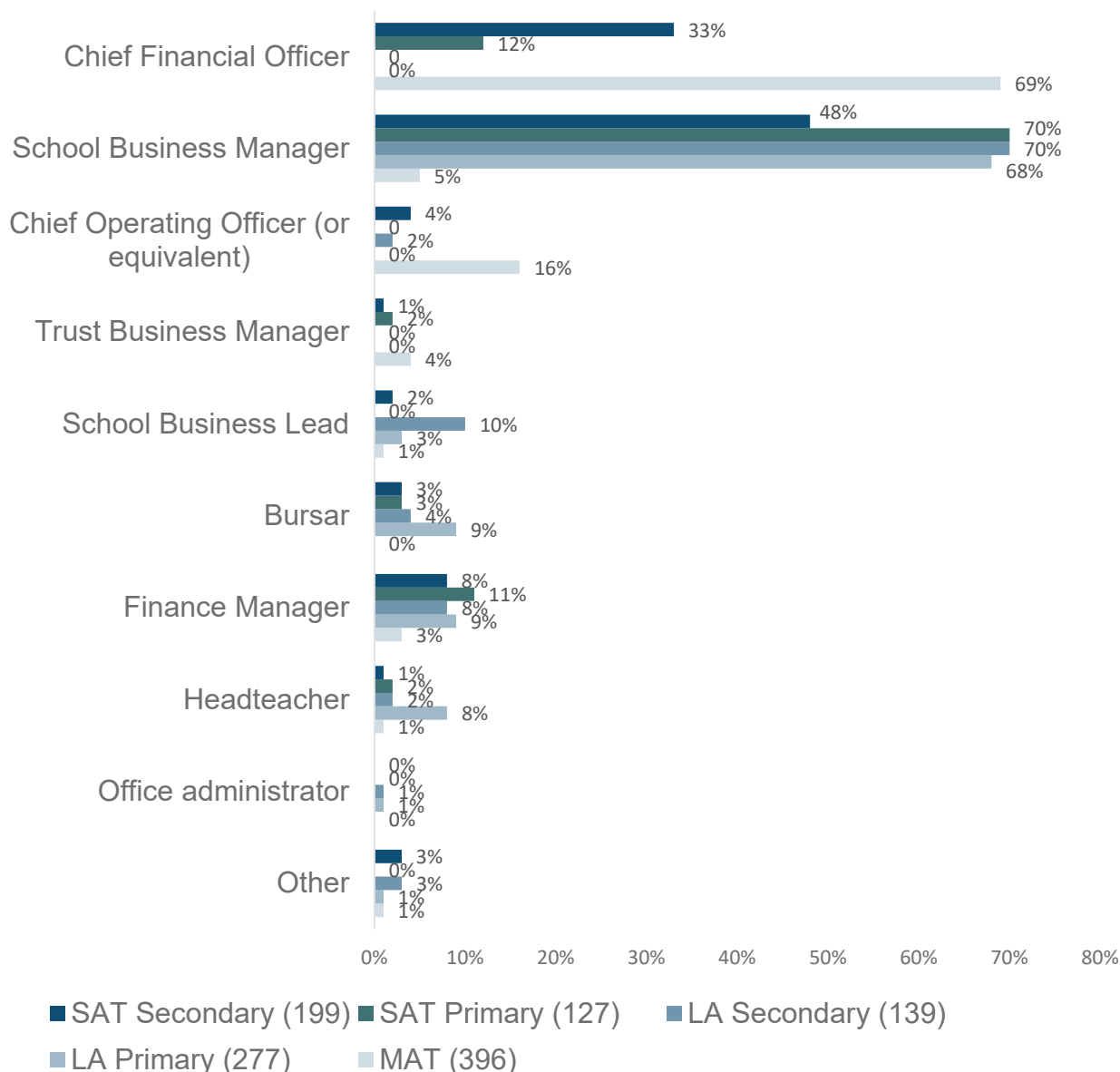
- Experience. The majority of financial leads for all phases and types of school/trust are experienced. Just under three-quarters have been a school business professional for 6 years or more, and most intend to stay in the profession.
- Qualifications. Eighty-five per cent of School Business Managers are qualified to at least Level 4, 58% to at least Level 5. Of those not qualified to Level 4, 51% have 6 or more years' experience, and of those not qualified to level 5 this was 68%.
- Eighty-three per cent of Chief Financial Officers were qualified to at least Level 6 and 71% to at least Level 7. Of those not qualified to level 6 or 7, the vast majority (94%) had 6 or more years' experience.
- A third of all respondents plan further study in next three years.
- Professional standards, professional membership and CPD. Respondents from trusts (i.e., SATs and MATs) are more likely to be a member of a professional body related to school business professional work than those from LA maintained schools.
- Of the six SBP professional standards, confidence is highest in the operational leadership and finance aspects. As might be expected given the nature of the respondents (e.g., some very senior Chief Financial Officers in large MATs and others SBM in small primaries), confidence varies on the other four standards. This variability may reflect the usual responsibilities and areas of specialism associated with particular SBP roles and with other SBPs in an institution having a more detailed understanding and/or responsibility for standards.
- Those respondents in the most senior positions (i.e., CFO and COO in trusts) are spending more time a year on continued professional development than financial leads in less senior positions (e.g., SBM).

⁵ The research is not a survey of all SBPs in a school or trust, just the financial lead. These were best placed to answer the breadth of questions asked in the survey

Job roles of respondents

Respondents were provided with a list of roles and asked to select which best reflected their job⁶. As in the 2019 and 2021 SBP surveys⁷, in standalone schools the School Business Manager responded in the majority of cases. In MATs, the Finance Director / Chief Financial Officer tended to respond (69%), with the Chief Operating Officer being the next most likely to do so (16% of MAT responses) (Figure 1, below).

Figure 1: Job title of respondent by organisation type



Base: All respondents

⁶ This list used reflected the most common school business professional job roles.

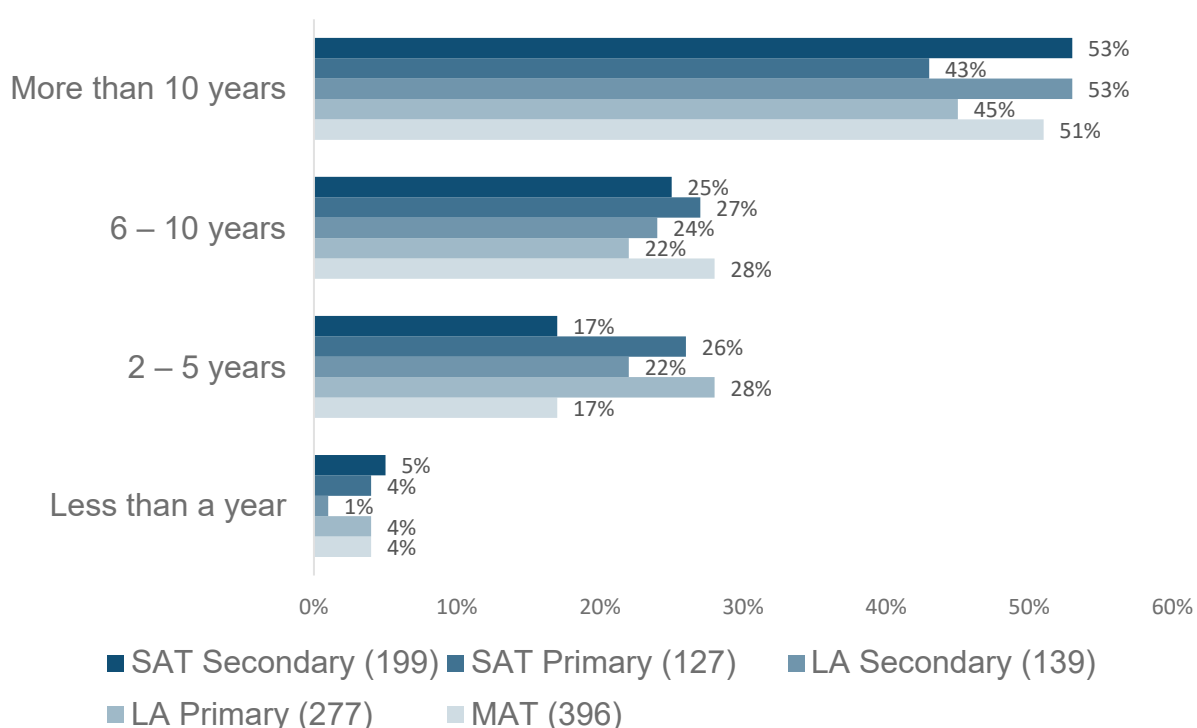
⁷ Department for Education (2021) School Business Professional Survey, pg. 10.

Experience

Financial leads in LA maintained schools and trusts are experienced. Overall, across all school and trust types, just under three quarters (74%) have been an SBP for 6 years or more, just under a half (49%) for more than 10 years.

Those leads in standalone⁸ primaries – both LA and SAT – are likely to be the least experienced compared to those in standalone secondaries and MATs. Two thirds (67%) of financial leads in LA (P) have more than 6 years' experience and 70% of SAT primaries do. Just over half (51%) of leads in MATs have more than 10 years' experience, and just over a quarter (28%) have 6-10 years' experience (Figure 2 below).

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



Base: All respondents

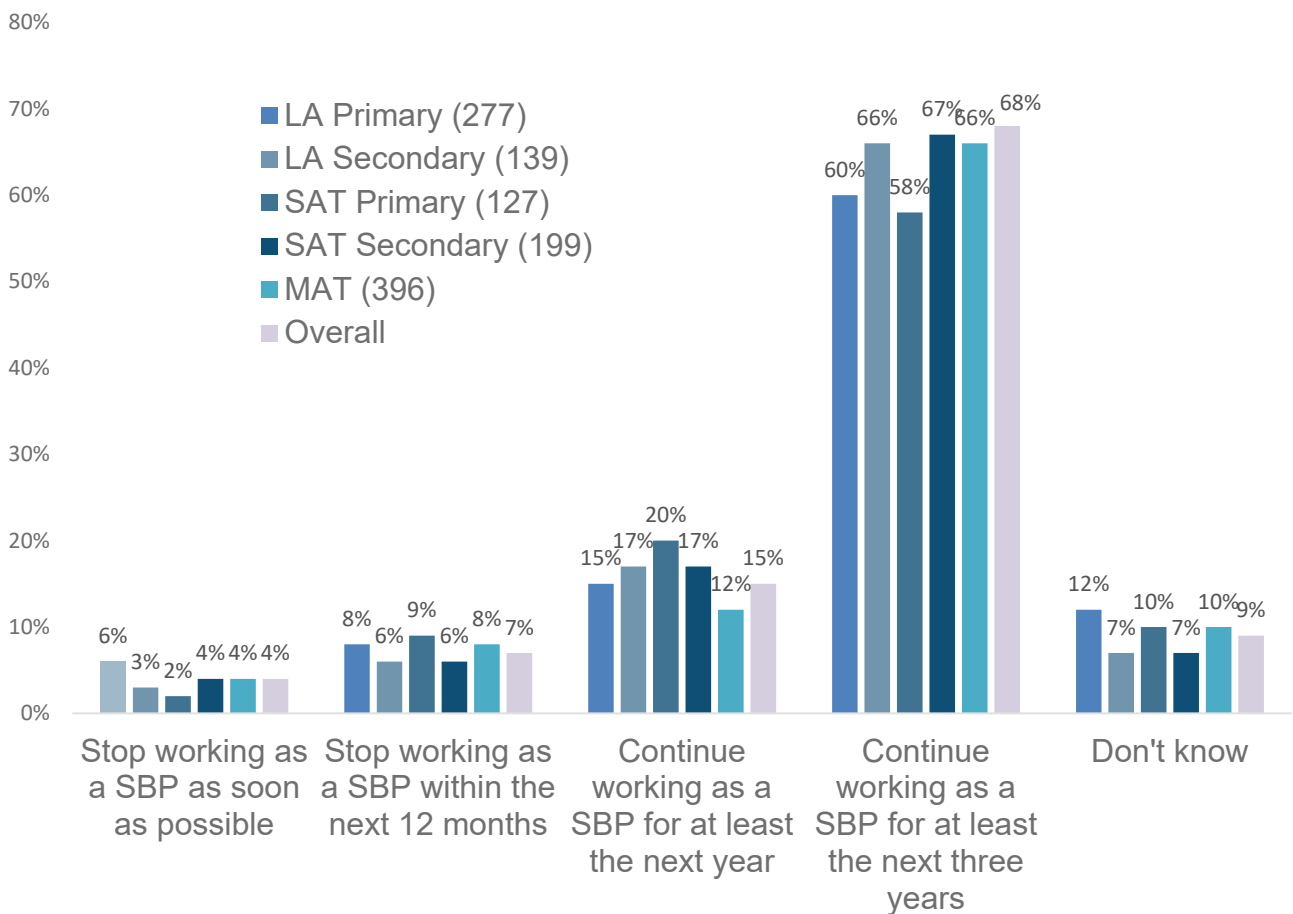
Not shown on Figure 1 or 2 but asked in the survey, just under half of respondents (45%) came into their current role from the private sector and 42% from a different public sector organisation. These proportions are broadly similar across all respondents, with no significant differences by type or phase of school or trust.

⁸ As a reminder standalone primaries are LA primaries and SAT primaries; standalone secondaries are LA secondaries and SAT secondaries

Intentions to continue working as a school and trust business professional

Most respondents wish to continue working as an SBP for the foreseeable future. The patterns of their future intentions are broadly consistent across all five main survey groups (LA (P), LA (S), SAT (P), SAT (S) and MATs), with no significant variation in responses. Intentions shown in Figure 3 below are similar to those of the 2021 SBP survey in that most financial leads intend to continue working as an SBP for at least the next three years. Overall, just under two thirds (63%) intend to continue working as a SBP for at least the next three years. There is some uncertainty, though, with 8% wanting to stop working as a SBP within the next 12 months and 10% don't know.

Figure 3: Intentions to stay working as a School Business Professional



Base: All respondents

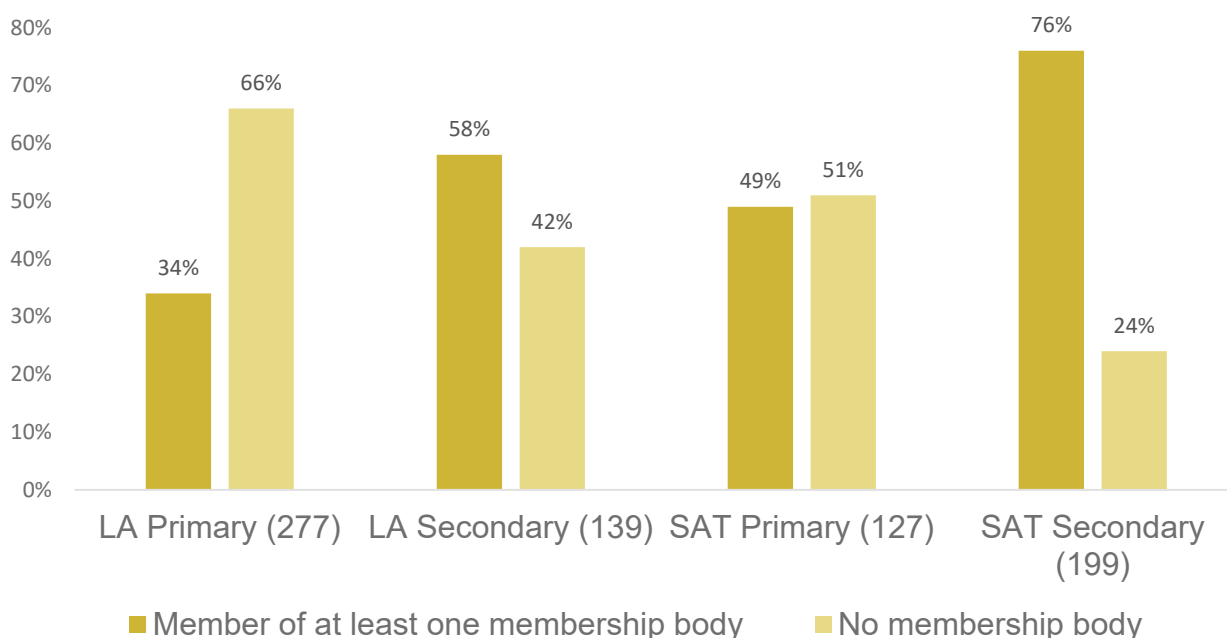
Professional body membership

Respondents were asked about professional body membership⁹, whether they are a member of one of ten professional bodies and if they are, whether membership is essential to their role. Those without a membership were asked the reasons why.

Those in trusts (i.e., a SAT (65%) or a MAT (84%)) are more likely to be a member of one of the 10 professional bodies listed than leads from LA maintained schools (36%)¹⁰. When examined by phase of school, it shows financial leads from both types of primaries (LA (P), 34% and SAT (P), 49%) are least likely to have professional body membership (Figure 4).

The most common membership, accounting for just under a quarter (24%) of all respondents, is the Institute for School Business Leadership (ISBL).

Figure 4: Professional body membership



Base: All respondents

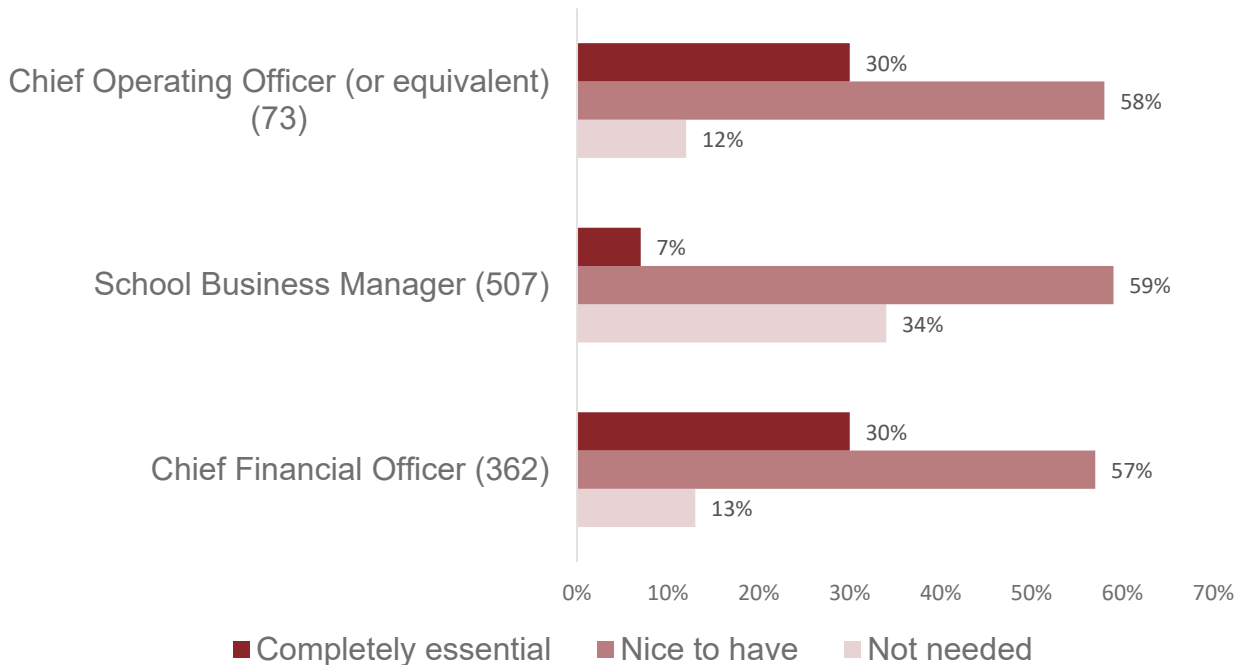
Professional membership is something most CFOs, SBMs and COOs (around 6 in 10) see as 'nice to have' (Figure 5, below). This changes with seniority: the more senior an

⁹ Memberships covered: The Institute of School Business Leadership (ISBL); Association of Accounting Technicians; The Institute of Chartered Accountants in England and Wales (ACA); Chartered Association of Certified Accountants (ACCA); The Chartered Institute of Management Accountants (CIMA); The Chartered Institute of Public Finance and Accountancy (CIPFA); Association Of School And College Leaders (ASCL); The Chartered Institute of Personnel and Development (CIPD); The Chartered Management Institute (CMI); The Chartered Institute of Procurement and Supply (CIPS).

¹⁰ Not shown on Figure 4

individual, the more likely they are to think that professional body membership is essential. Just under a third of CFOs (30%) and COOs (30%) see it as essential compared to 7% of SBMs, who are most likely to think it is not needed (34%).

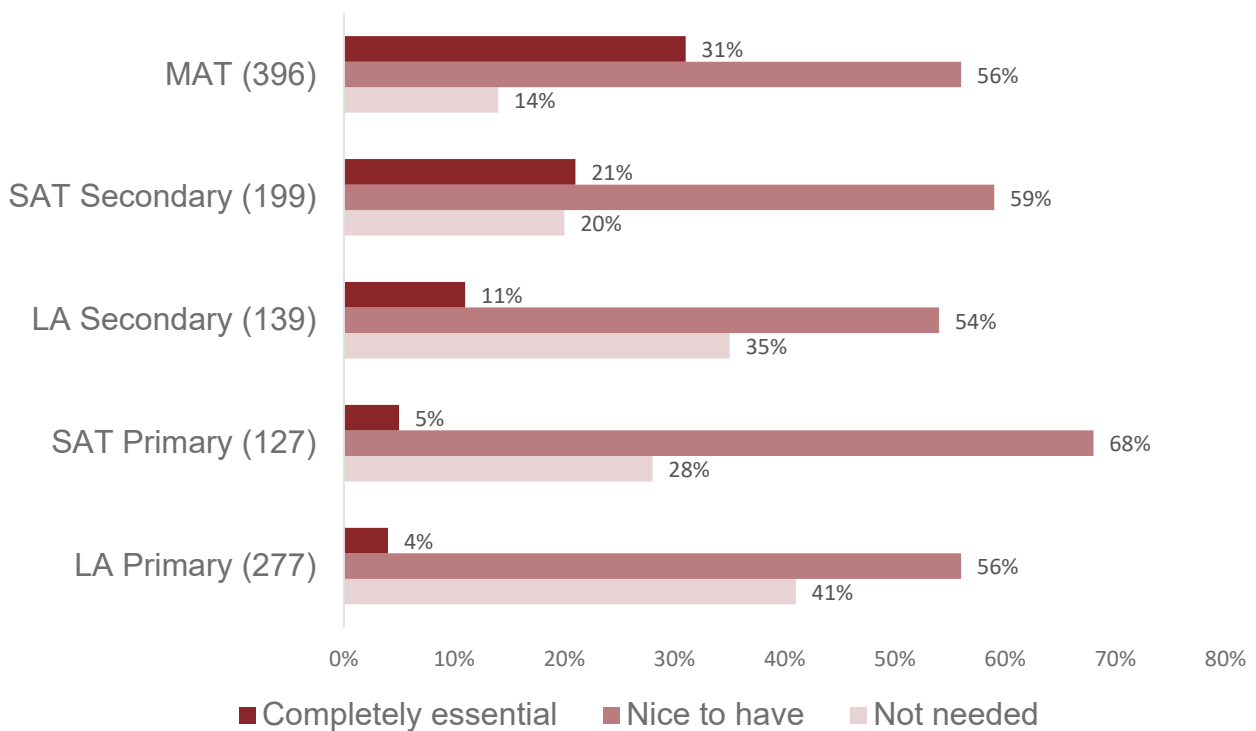
Figure 5: Importance of professional body membership - respondent role



Base: SBM, CFO and COOs only

The same overall pattern of most respondents seeing professional membership as ‘nice to have’ but not ‘completely essential’ remains in the data when split by phase and type of school or trust (Figure 6, below). There is, though, some subtle variation within that overarching conclusion with respondents from LA maintained schools (39%) more likely than SATs (22%) and MATs (14%) to believe membership is not needed. In addition, data aggregated at a phase of school level, shows financial leads in standalone primaries (37%) were more likely to think membership is not needed than those in standalone secondaries (22%).

Figure 6: Importance of professional body membership – type and phase of school or trust



Base: All respondents

Those who are not a member of a SBP professional body were asked why they did not have membership, with their responses coded into emergent themes. The most common reason cited was one of uncertainty - the majority¹¹ (43%) ‘did not know - whilst 14% ‘never felt the need to (join a membership body)’, and 9% noted the ‘fees are too expensive’¹².

Qualifications held and intentions for future study

All respondents were asked to confirm whether they held certain qualifications (Table 2 below shows the most popular responses, a more detailed table is available in the Annex). As the respondent could select more than one qualification, percentages will not add up to one hundred per cent.

Overall, the longer they have been in role, the more likely they are to have a SBP specific qualification: 68% of respondents who have been an SBP more than 10yrs have an SBP specific qualification compared to only 20% if they’ve been in role 6-10 yrs. Respondents

¹¹ 424 responses (unweighted)

¹² Other reasons were cited but base sizes for these comments are very small and not thus reported

from MATs are more likely to be higher qualified likely reflecting their increased responsibilities relative to financial leads in standalone schools.

Looking specifically at qualifications held by leads in different types of standalone school, levels of qualifications held tend to be higher in standalone secondaries than primaries. Respondents in standalone secondaries (19%) are more likely than those in standalone primaries (11%) to hold a L5 Diploma in school business management, and have a degree in a financial, business or HR related subject (23% vs 15%). The most popular qualification for those in both types of primaries is a L4 diploma in school business management (32% of leads in LA primary leads has one, 42% of leads in SAT primaries).

In MATs, where respondents are more likely to have greater responsibilities, they are more likely to hold an accountancy specific qualification, with 1 in 5 (21%) holding a CIMA qualification, and 13% holding a professional qualification from the Institute of Chartered Accountants in England and Wales (ACA); higher percentages than those from standalone schools.

Aggregating the types of qualification into three groups - SBP specific qualification, Accountancy specific qualification or general qualification – and splitting the data by school/trust type, we see that respondents from MATs (70%) are more likely than those from both SATs (49%) and LAMS (23%) to hold an accountancy specific qualification.

Table 2: Qualifications held by phase and type of school/trust

Qualification and Level	LA (P)	LA (S)	SAT (P)	SAT (S)	MAT
Level 4 Diploma in School Business Management	32%	35%	42%	28%	22%
Association of Accounting Technicians - Professional Qualification (level 4)	9%	9%	14%	10%	10%
Level 5 Diploma in School Business Management	10%	22%	13%	16%	15%
Degree in a non-financial, business or HR related subject (level 6)	17%	24%	14%	21%	14%
Degree in a financial, business or HR related subject (level 6)	14%	24%	17%	22%	31%
Level 7 CIPFA Certificate in School Financial and Operational Leadership	1%	1%	5%	10%	9%
Masters in a non-financial, business or HR related subject (level 7)	4%	4%	4%	3%	4%
Masters in a financial, business or HR related subject (level 7)	1%	12%	2%	8%	11%
Institute of Chartered Accountants in England and Wales (ACA) - Professional Qualification	1%	1%	2%	9%	13%
Chartered Association of Certified Accountants (ACCA) - Professional Qualification	1%	3%	2%	7%	10%
Chartered Institute for Management Accountants (CIMA) – Professional Qualification	3%	9%	6%	11%	21%

Examining the same qualification data by CFO and SBM respondents, who collectively comprise 74% of all survey respondents, a SBM will tend to have school business profession specific qualifications at level 4 or level 5. Forty-two per cent (42%) of SBMs have a level 4 diploma in school business management, with 15% a level 5. Sixteen per cent (16%) have with a degree in a financial, business or HR related subject and 17% in a non-financial, business or HR related subject. A Chief Financial Officer will tend to have higher level qualifications (31% have a L6 degree in a financial, business or HR related

subject) and be more likely to hold a chartered accountancy membership of some kind such as ACA (14%) or CIMA (24%) (see Table 3 below).

Table 3: Qualifications held by job role: SBM and CFO

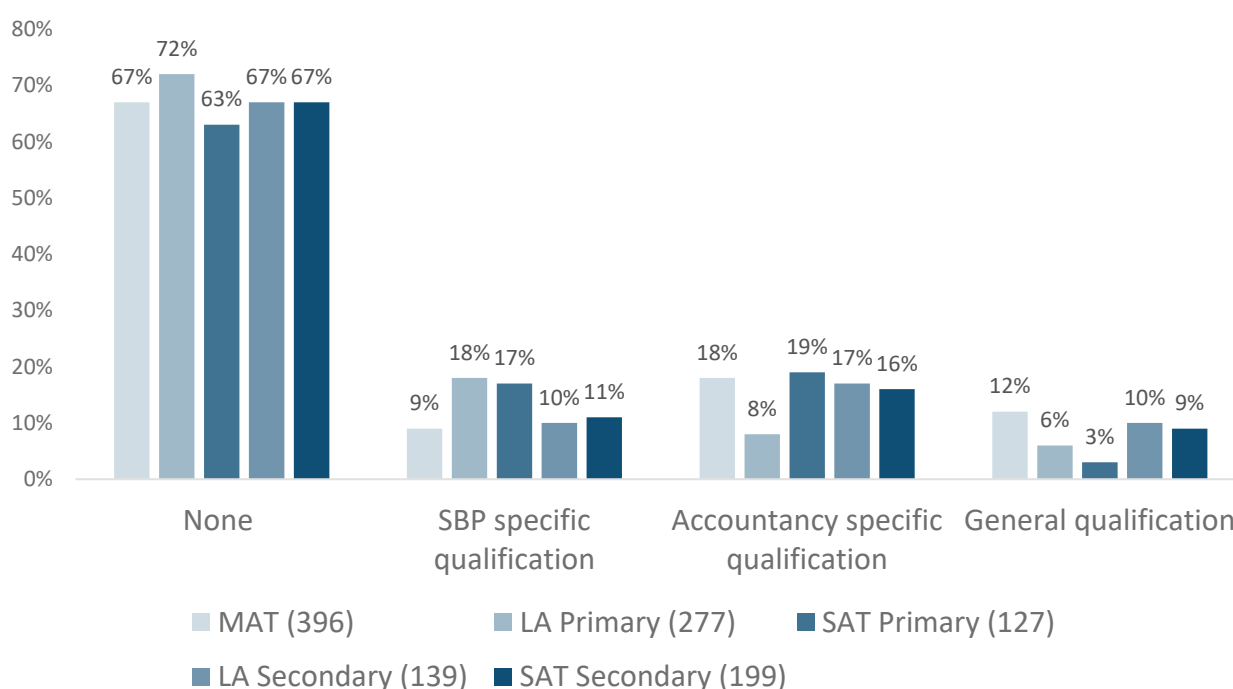
Qualification and Level	Chief Financial Officer (CFO) (367)	School Business Manager (SBM) (504)
Level 4 Diploma in School Business Management (formerly known as CSBM)	19%	42%
Level 5 Diploma in School Business Management (formerly known as DSBM)	12%	15%
Degree in a non-financial, business or HR related subject (level 6)	15%	17%
Degree in a financial, business or HR related subject (level 6)	31%	16%
Level 7 CIPFA Certificate in School Financial and Operational Leadership	11%	4%
Masters in a financial, business or HR related subject	8%	3%
Institute of Chartered Accountants in England and Wales (ACA) - Professional Qualification	14%	2%
Chartered Association of Certified Accountants (ACCA) - Professional Qualification	10%	3%
Chartered Institute for Management Accountants (CIMA) – Professional Qualification	24%	5%

The ISBL professional standards outline that a School Business Manager (SBM) should typically be qualified to at least level 4, or between levels 5 to 6 if in reporting to the Senior Leadership Team in a school or trust. Of SBM respondents to the survey, 85% were qualified to at least Level 4, and 58% to at least level 5. Of those not qualified to level 4, 51% had 6 or more years' experience, and of those not qualified to level 5 this was 68%. Of CFO respondents, 83% were qualified to at least Level 6 and 71% to at least Level 7. Of those not qualified to level 6 or 7, the vast majority (94%+) had 6 or more years' experience.

Future intentions to study a professional qualification

As noted above, the majority of respondents are experienced and well qualified. Whilst the majority do not intend to study a further qualification in the next three years some intend to do so (Figure 7). Thirteen per cent intend to study a SBP specific qualification, 15% an accountancy qualification and 9% a general qualification. Respondents from LA maintained schools and SATs (who will tend to be school business managers) are more likely to study a SBP specific one than those in MATs, who are more likely to focus on an accountancy specific qualification; likely reflecting the responsibility of their CFO role.

Figure 7: Qualifications intended to study in the next three years



Base: All respondents

Continued professional development¹³ and professional standards

Respondents were asked about how important certain professional development activities – training, mentoring, previous experience, qualifications and networking - are to meet their current responsibilities (Table 4, 5, 6, 7 and 8 below breaks this data down into school phase and school / trust type). The narrative that follows is split into six small

¹³ Continuous professional development describes any structure and/or pre-planned learning activities which professionals engage into develop and enhance their abilities, including activities such as training workshops, studying for a qualification, conferences and events, e-learning programs, coaching, and mentoring

paragraphs highlighting some key takeaways from each of the five activities, focusing on the proportions seeing a particular activity as ‘completely essential’, ‘nice to have’ or ‘not needed’.

Previous experience: Overall, just under 6 in 10 (57%) see it as ‘completely essential’ to their role. There are differences by phase of school, with financial leads in standalone secondaries (64%) more likely to see previous experience as essential than those in standalone primaries (47%). In addition, respondents in SATs (64%) and MATs (66%) are more likely to see previous experience as essential compared to those in LA maintained schools (43%).

Training: Seven in ten (69%) see training as ‘completely essential’. There is a phase of school difference here though: three quarters (74%) of both types of primaries see it as essential, with figures for respondents in both types of secondary slightly lower (65%).

Networking: Four in ten respondents (41%) see networking as essential as most (around 6 in 10) see it as ‘nice to have’. On both measures (i.e., whether essential or nice to have) there are no significant variation in responses by school phase or school / trust type.

Mentoring: One in five (19%) of all respondents see mentoring as essential, the majority (68%) see it as nice to have.

Professional qualifications: Around a quarter of respondents in both types of primaries see them as completely essential (24% LA (P) and 28% SAT (P)), and whilst a quarter of those in LA secondaries have the same view as them, those in SAT secondaries are different: 43% seeing professional qualifications as completely essential. This increased importance shared by financial leads from MATs, with 55% seeing professional qualifications as essential for their role.

Table 4: Importance of certain professional development activities to meeting responsibilities – LA primaries

LA primaries	Previous experience	Training	Networking	Mentoring	Professional qualifications
Not needed	3%	0%	3%	12%	16%
Nice to have	56%	25%	56%	65%	61%
Completely essential	42%	75%	40%	23%	24%

Table 5: Importance of certain professional development activities to meeting responsibilities – SAT primaries

SAT primaries	Previous experience	Training	Networking	Mentoring	Professional qualifications
Not needed	2%	2%	6%	13%	10%
Nice to have	35%	25%	59%	71%	62%
Completely essential	62%	72%	35%	17%	28%

Table 6: Importance of certain professional development activities to meeting responsibilities – LA secondaries

LA secondaries	Previous experience	Training	Networking	Mentoring	Professional qualifications
Not needed	3%	0%	4%	9%	15%
Nice to have	41%	32%	53%	72%	61%
Completely essential	56%	68%	44%	19%	24%

Table 7: Importance of certain professional development activities to meeting responsibilities – SAT secondaries

SAT secondaries	Previous experience	Training	Networking	Mentoring	Professional qualifications
Not needed	3%	1%	2%	17%	7%
Nice to have	31%	35%	58%	71%	51%
Completely essential	66%	64%	40%	13%	43%

Table 8: Importance of certain professional development activities to meeting responsibilities – MATs

MATs	Previous experience	Training	Networking	Mentoring	Professional qualifications
Not needed	2%	1%	5%	11%	6%
Nice to have	33%	35%	52%	71%	39%
Completely essential	65%	64%	44%	18%	55%

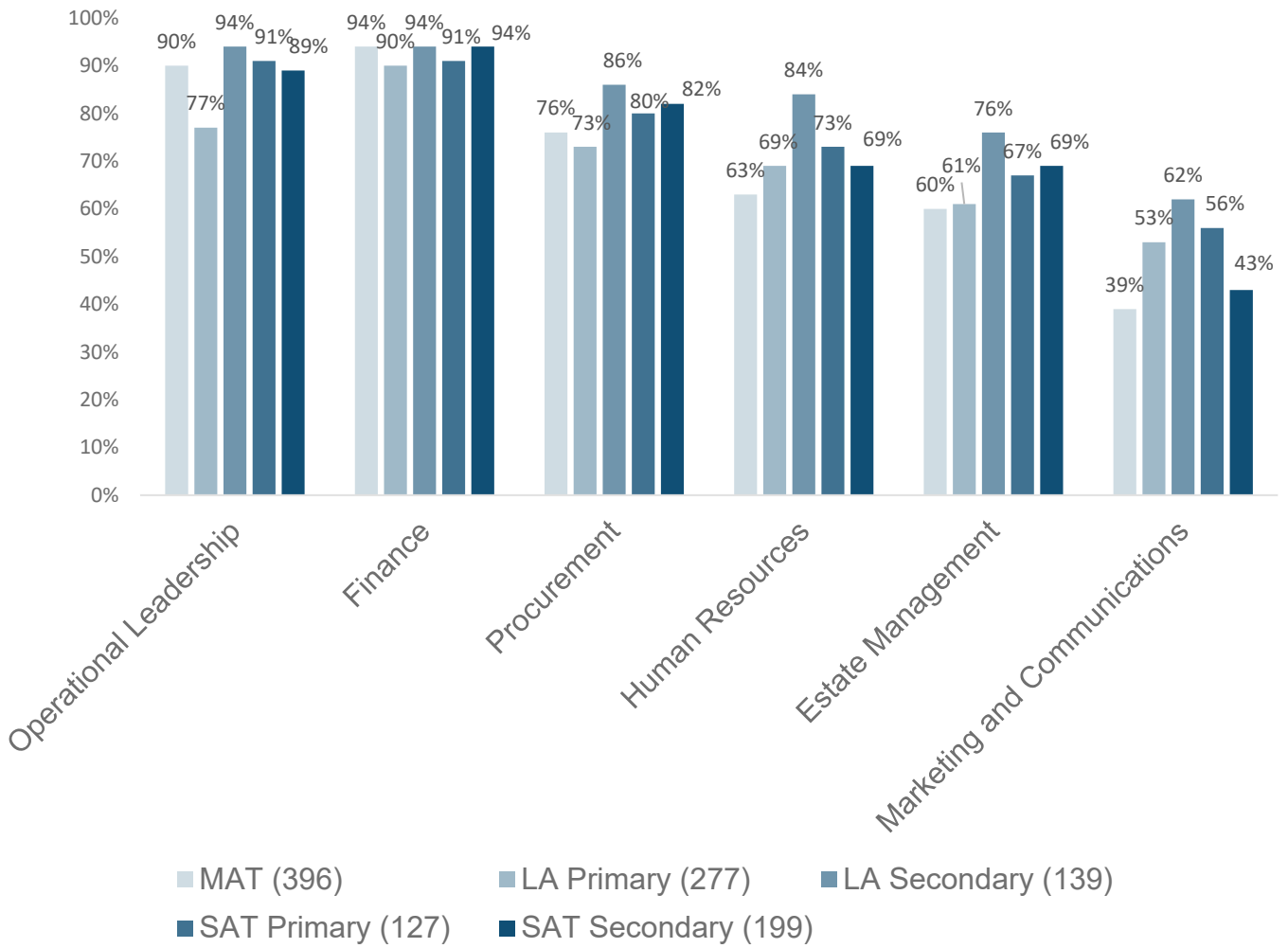
SBP professional standards

The School Business Professional Standards – developed by the sector for the sector and endorsed by representative bodies and the department - set out the core and specialist areas of competency required to operate at four tiers of practice from entry level to executive leadership¹⁴. Respondents were asked about their level of personal confidence in the six main professional standards and how many days they spend on continued professional development (CPD) in a year.

Figure 8 shows that, overall, net confidence is highest in operational leadership and finance. More noticeable variability emerges if we look at the other four professional standards. Figure 9 splits the same net confidence by one of three types of respondent: CFO, SBM and COO. Some of the percentage differences between these role types might reflect the usual responsibilities and/or areas of specialism associated with particular SBP roles, with other SBPs in the institution having a more detailed understanding and/or responsibility for aspects, for example estate management or human resources.

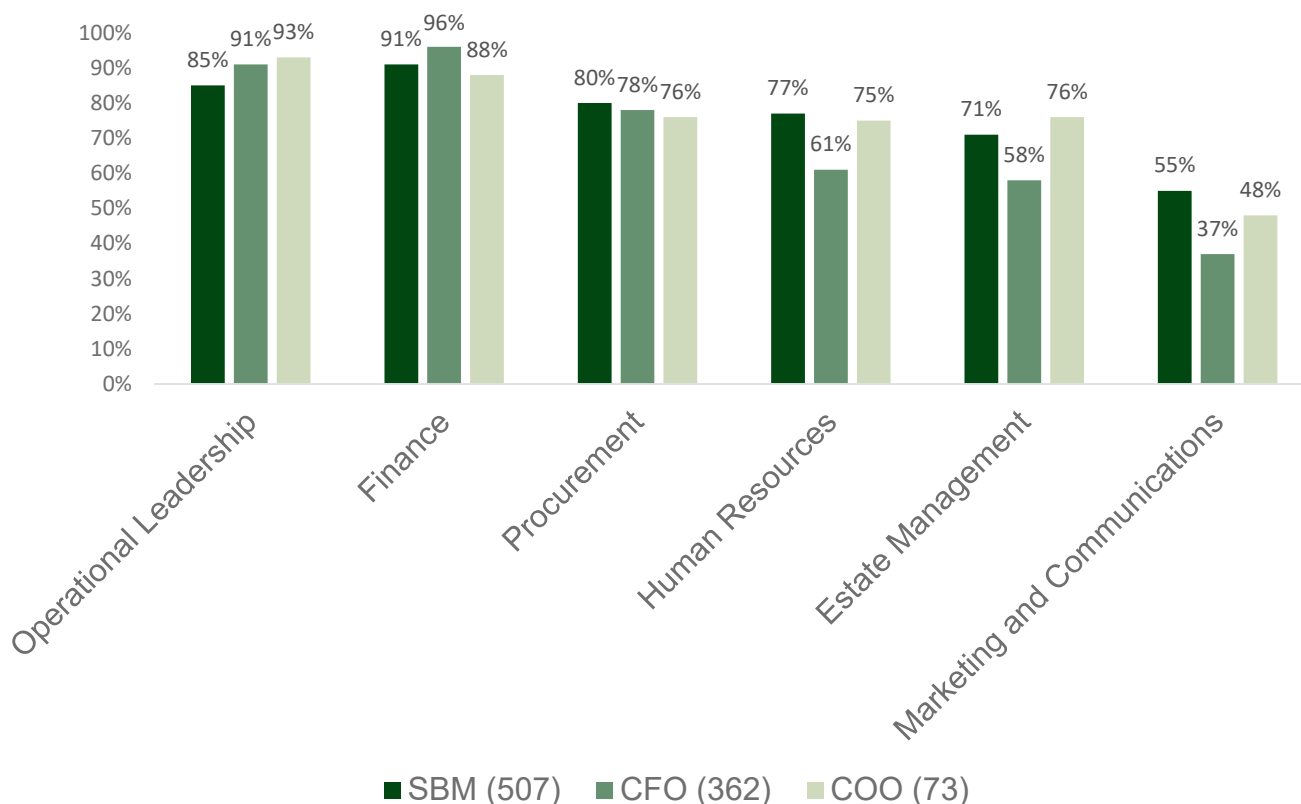
¹⁴ [ISBL Professional Standards — ISBL](#)

Figure 8: Net confidence in SBP professional standards - phase and type school / trust



Base: All respondents

Figure 9: Net confidence in SBP professional standards – CFO, SBM and COO



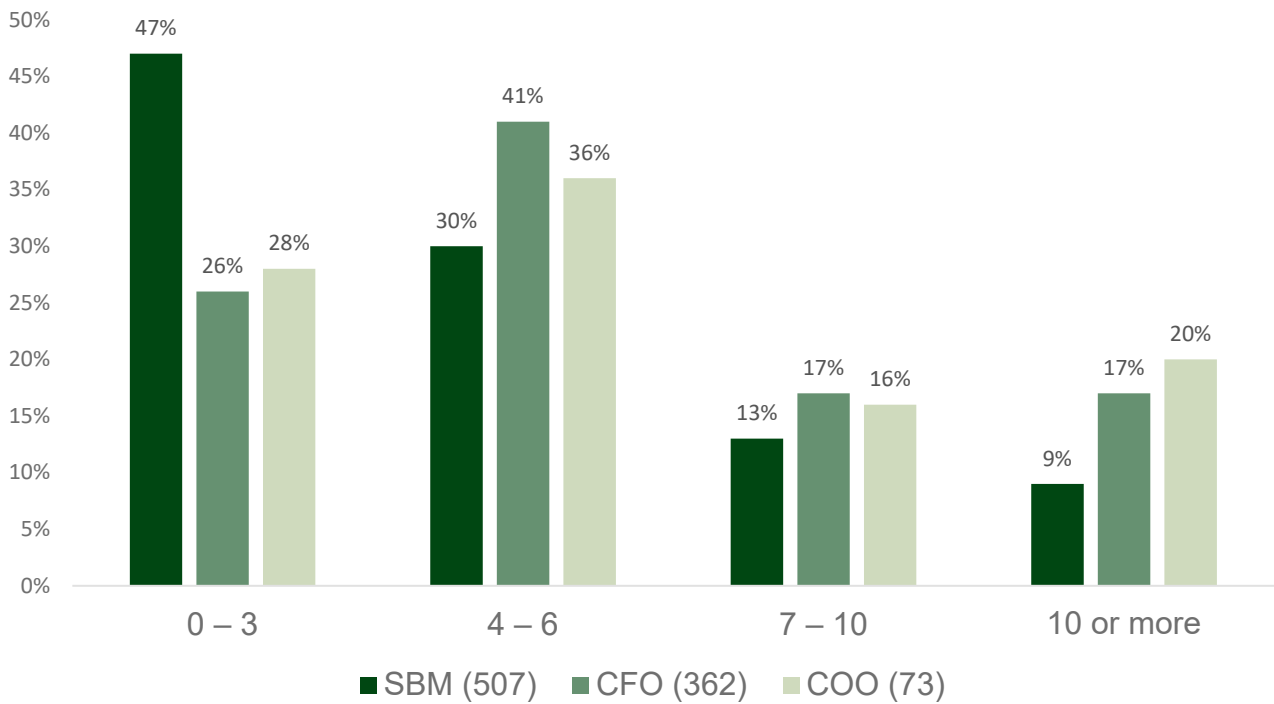
Base: SBM, CFO and COOs only

Continued professional development

Those respondents in the most senior SBP positions (i.e., CFO and COO in trusts) are spending more time a year on continued professional development than financial leads in less senior positions (e.g., SBM). Just under 1 in 10 SBMs spend more than 10 days a year, compared to 1 in 5 COOs and 1 in 6 CFOs. Nearly half of SBMs (47%) are spending 0-3 days per year whilst a CFO is most likely to spend between 4-6 days per year (41% of them do), as is a COO (36% of them do) (Figure 10 below).

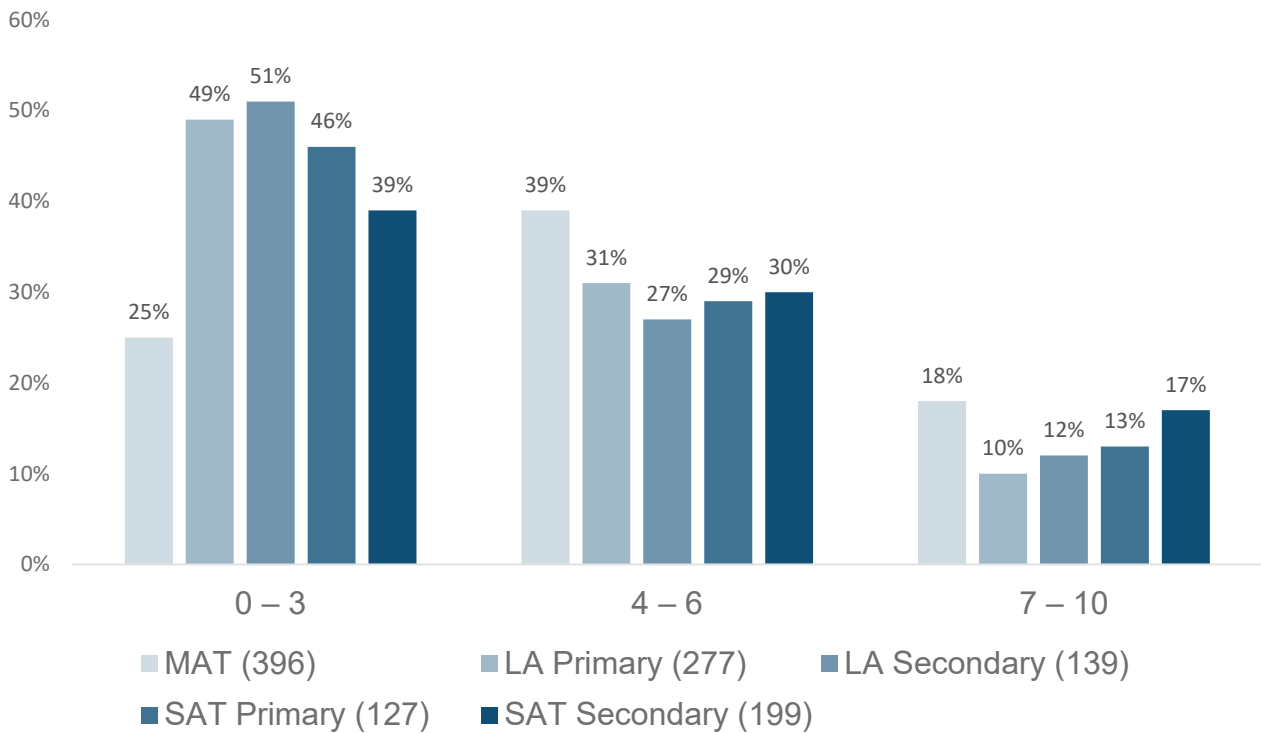
Examined by phase and type of school/trust (Figure 11), most respondents from LAMS (49%) and SATs (42%) undertake 0-3 days CPD a year, whilst most in MATs (39%) undertake 4-6 days.

Figure 10: CPD days per year – by main respondent role



Base: SBM, CFO and COOs only

Figure 11: CPD days per year – by phase of school and type of school/trust



Base: All respondents

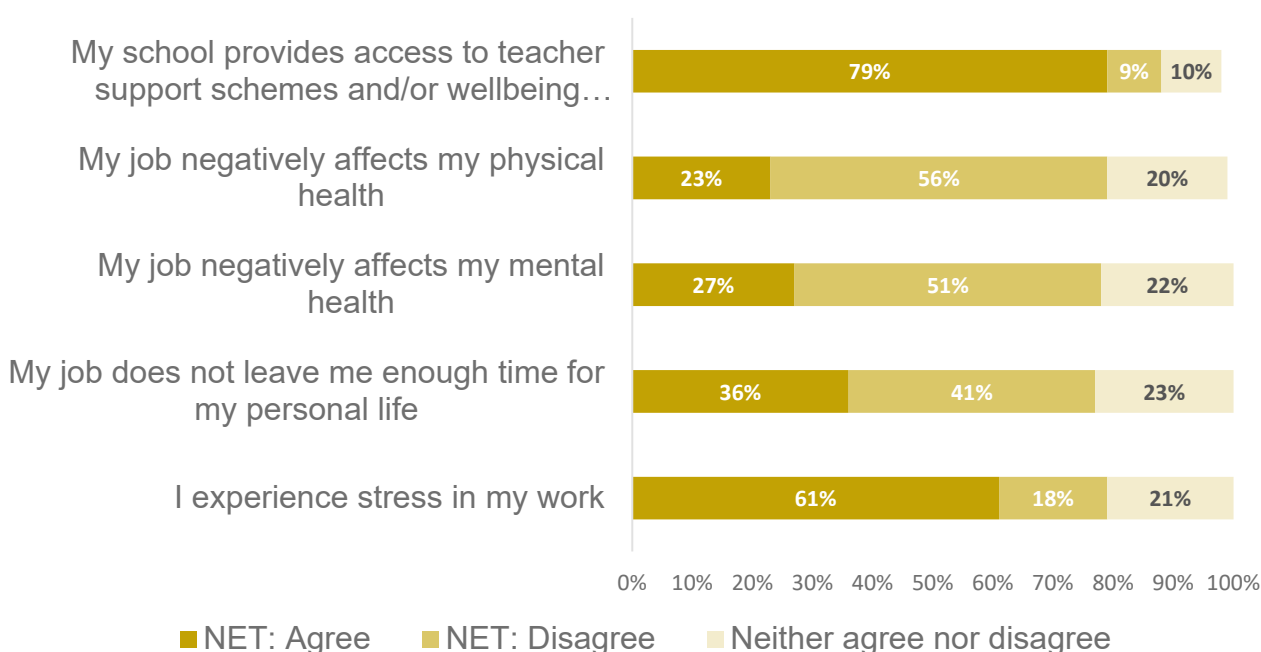
Wellbeing of respondents

The final questions in this section show responses to a series of statements related to respondent wellbeing. The Department has anecdotal evidence of workload challenges which are negatively impacting SBP wellbeing and given our commitment to ensuring that every school and academy trust is led by those with the skills, knowledge and capacity to achieve excellent school resource management, it was important that we learnt more about this and address any challenges.

Figure 12 below shows most do not see their role as affecting their physical (56%) and mental health (51%). However, for just over a quarter the role negatively affects their mental health (27%) and just under a quarter (23%) their physical health. Seventy-nine per cent of schools and trusts provide access to teacher support schemes and/or wellbeing programmes for staff.

Examining each statement by phase and type of school/trust (not shown on Figure 12) does not highlight many statistically significant differences. Notable variations in the data for different statements related to their wellbeing included: 'my job negatively affects my mental health', standalone primaries 31% vs. 22% standalone secondaries (significantly different) and 'my job does not leave me enough time for my personal life', LA secondary (41%) vs. LA primary (31%).

Figure 12: Financial lead wellbeing



Base: All respondents

Chapter 2: Financial lead involvement in standalone school and trust operations

This chapter of the report moves away from individual characteristics of financial leads and onto the respondent's role in various aspects of school or trust operations

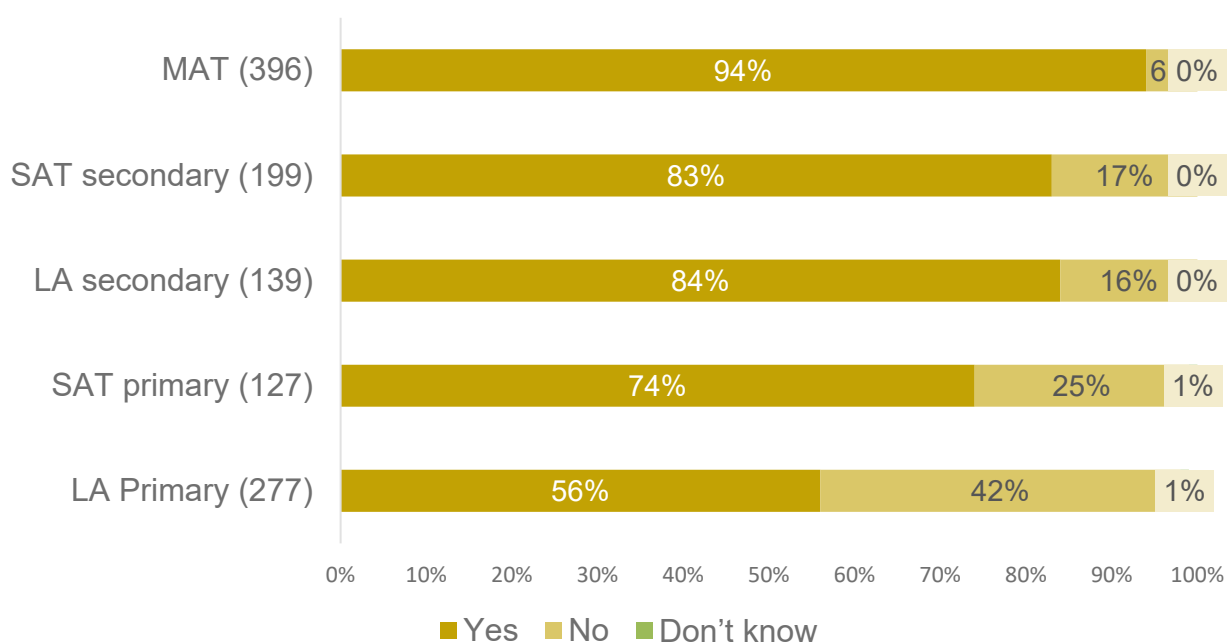
Key points of chapter:

- An SBP is on the senior leadership team of a school / trust for most MATs and standalone secondary schools. Although they are usually on the SLT in primary schools, it is lower than for secondary, especially for LA schools. The (relatively) low LA primary figure (56%) is broadly consistent with previous 2019 (61%) and 2021 (56%) surveys which asked the same question.
- Most respondents are involved in 'some' or 'all' strategic planning, with financial leads in MATs having the greatest extent of involvement. A type of school difference emerges with financial leads at both SAT secondaries and SAT primaries having more involvement in planning than their LA counterparts.
- Capacity/workload, organisational culture, and lack of experience / knowledge of the curriculum were the three main reasons for not being involved in 'all' aspects of strategic planning.

SBP inclusion on the senior leadership team (SLT)

Respondents were asked whether they, or another SBP, are on the senior leadership team (SLT) of the school or trust (Figure 13 below). They are in most instances, with 94% on MATs, 84% on LA secondaries and 83% on SAT secondaries. The phase of school picture is significantly different at the primary level where they are on just over half of LA primaries (56%) but three-quarters (74%) of SAT primaries. The (relatively) low LA primary figure of 56% is broadly consistent with previous 2019 (61%) and 2021 (56%) surveys which asked the same question.

Figure 13: SBP inclusion on a school or trust’s senior leadership team



Base: all respondents

Involvement in strategic planning

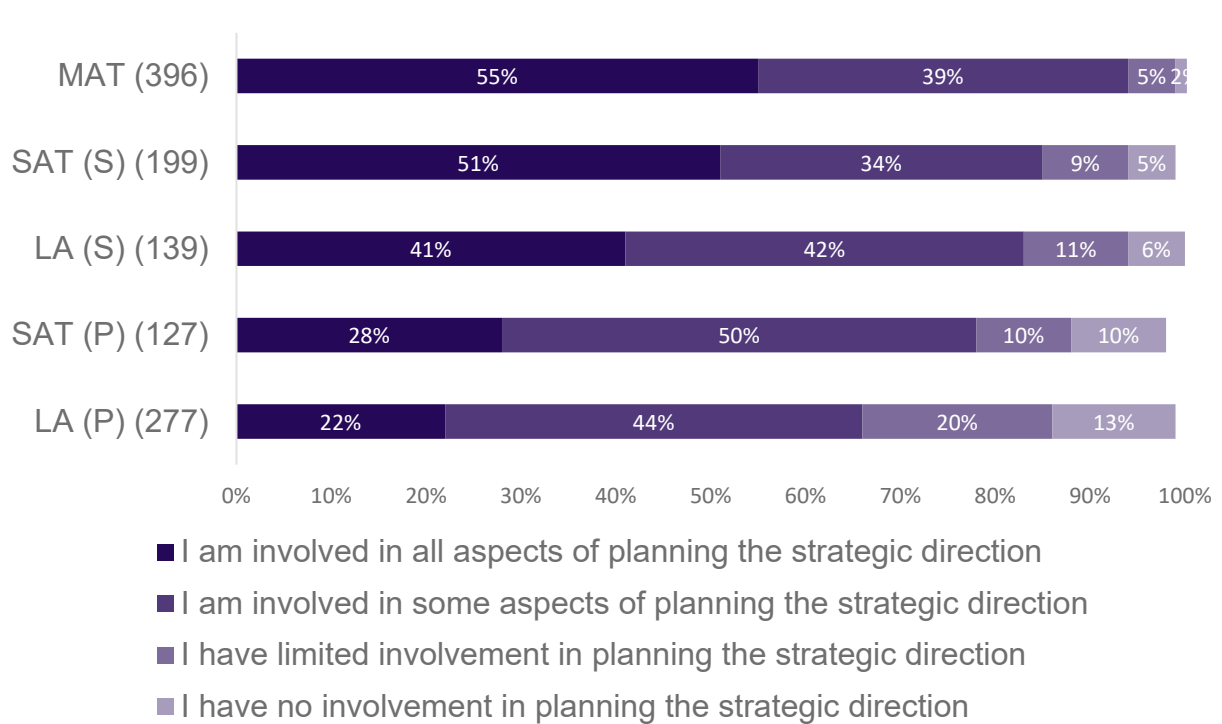
Most respondents are involved in ‘some’ or ‘all’ strategic planning (Figure 14, below), with leads in MATs having the greatest extent of involvement across the five groups being reported here (more than half (55%) of leads in MATs are involved in ‘all’ aspects).

Examining standalone primaries, the data shows that those in SAT primaries have slightly more involvement in strategic planning than their LA counterparts (28% being involved in ‘all’ aspects compared to 22% for LA primaries). In addition, 50% have some involvement (compared to 44% in LA primaries) and just 10% having limited involvement (compared to 20% of LA primaries).

The picture for secondaries shows that those leads in SATs (51%) are more likely to be involved in all aspects than those from LA secondaries (41%).

Those respondents not involved in all aspects of strategic planning were asked an open question why this was the case. Their open text responses (674) were coded into common reasons. Capacity/workload (58%) was the most common, followed by organisational culture (35%), and lack of experience / knowledge of the curriculum (27%). Not being on the senior leadership team (25%, and mainly driven by primary respondents) and lack of recognition of school business professionals (20%) were the other most cited reasons.

Figure 14: Involvement in planning the strategic direction of the school or trust



Base: All respondents

Chapter 3: Budget management and resource management support

Schools and trusts have significant budgets that require close monitoring to ensure that they are well managed, and the role of a SBP is to help ensure that these budgets are spent as efficiently as possible. The department has, over the past few years and in an incremental manner, provided a range of direct help, tools, and resources for SBPs, school leaders, other school staff and governing bodies in all school and trust types to help facilitate efficient resource management.

In this chapter responses to a series of budget and resource management questions are shown. In some instances, respondents are asked about their own job specific practice, and at other times about practice by their school or trust.

Key points of chapter:

- Most MATs and standalone secondaries use ICFP. Approximately 1 in 5 MATs, 1 in 5 of both types of standalone secondaries, and 1 in 5 SAT primaries intend to use it in the next 12 months (compared to 8% of LA primaries)
- Those who do not use ICFP were asked why this was the case. Just under a third don't use ICFP as they didn't see it as applicable to their context; about a quarter weren't aware of it (made up of largely LA primaries), and a fifth didn't know (notably at LA maintained schools).
- The use of DfE SRM resources varies by phase and type of school, reflecting in part a staggered rollout of the resources and some programmes operating a peer-to-peer support model.
- Most LA maintained schools and trusts use the Schools Financial Benchmarking and find it useful. Its utility has increased in recent years with more using the tool (compared to 2021) to identify or reconsider areas for possible efficiency improvements, as part of strategic discussions, and to inform budget setting.
- Respondents have a positive view of the View My Financial Insights (VMFI) tool, with 8 in 10 seeing it as quite useful. It is being applied in the ways intended with an increasing proportion of LA maintained schools and trusts using it to support strategic discussions at senior leadership team and governing body levels, and to inform budget setting.

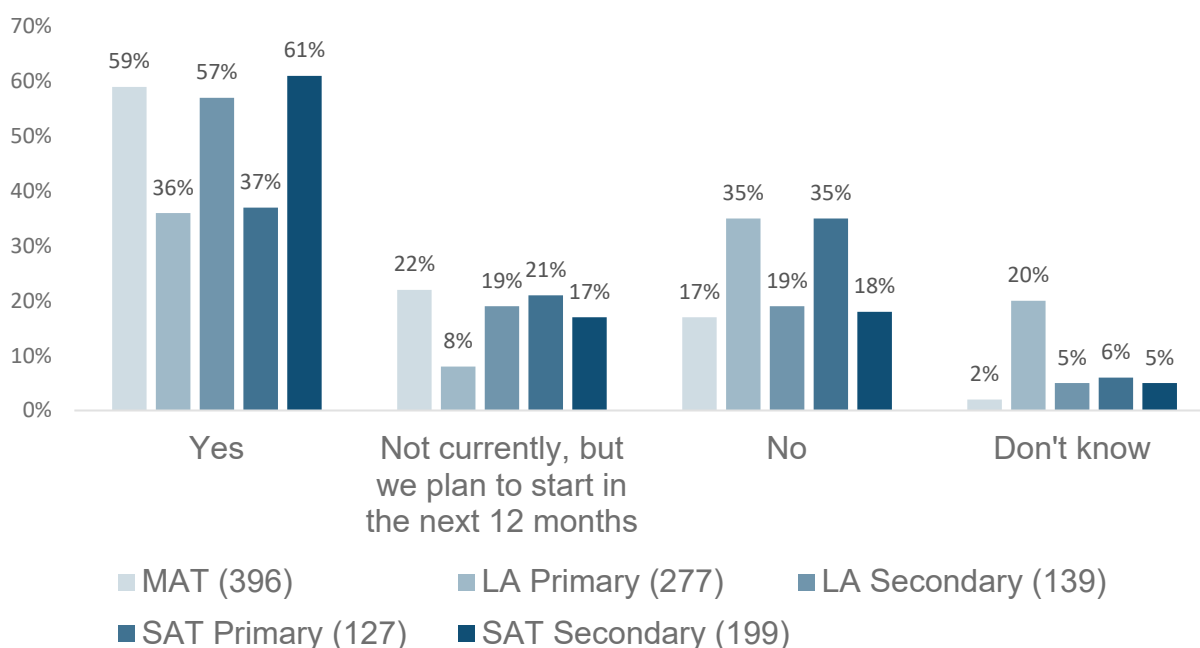
Integrated curriculum and financial planning

Integrated Curriculum and Financial Planning (ICFP) is a management process that helps schools and trusts plan the best curriculum for their pupils with the funding they have available. It can be used by any phase or type of school and involves measuring the current curriculum, staffing structure and finances, and using the information to create a 3-to-5-year plan.

MATs (59%) and standalone secondaries (60%) are more likely than standalone primaries (37%) to use it; the latter two statistics highlighting a phase of school difference in application¹⁵. There is, though, a difference between the primaries in the future application of the approach with just over 20% of SAT primaries intending to use it in the next 12 months compared to 8% of LA primaries

At a secondary school level, 57% of LA secondaries and 61% of SAT secondaries currently use ICFP, with this number set to rise as 1 in 5 of both LA secondaries (19%) and SAT secondaries (17%) intend to use it in the next 12 months. Such intentions are mirrored in MATs with 22% who don't currently use it planning do so.

Figure 15: Use of integrated curriculum and financial planning

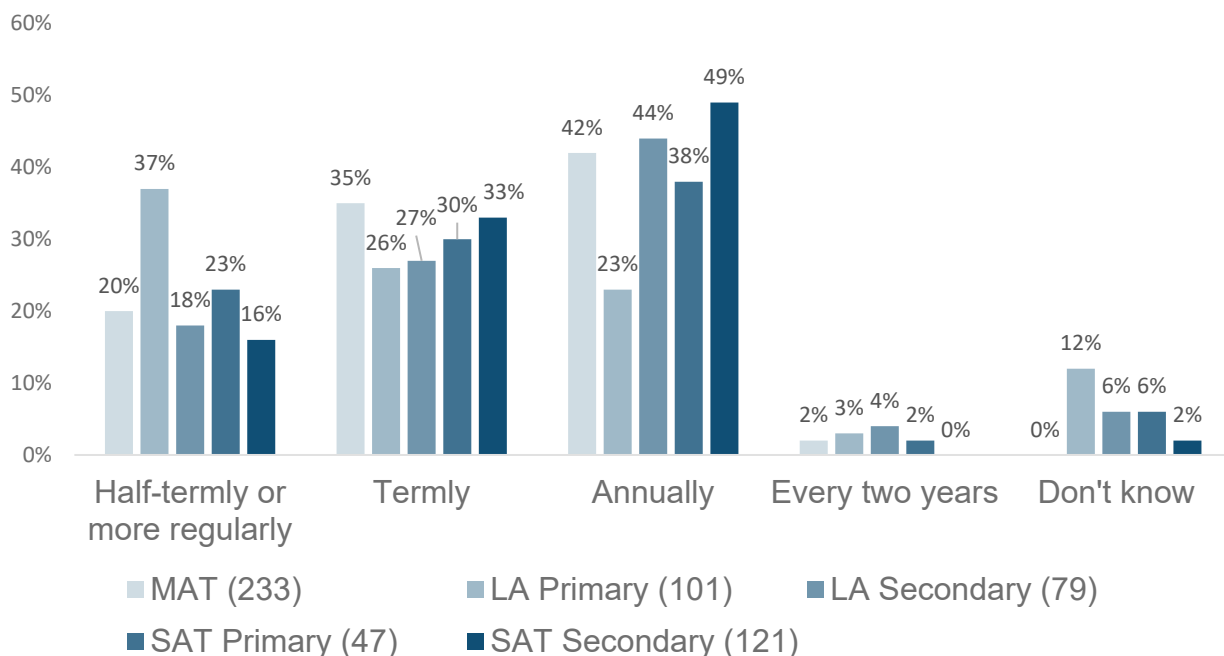


Base: All respondents

¹⁵ The different levels of adoption could be related to timetabling, with pupils in secondaries in different classes with different teachers

Of those that use ICFP, LA primaries will tend to review ICFP metrics the most frequently – 37% reviewing half-terms. MATs will review metrics less frequently, favouring either termly (35%) or annually (42%). SAT (P) and SAT (S) will also tend to favour termly and annually (Figure 16 below).

Figure 16: How often ICFP metrics are reviewed



Base: those who used a form of ICFP

All those that do not use ICFP (304 responses) were asked why this was the case and text responses were coded into themes. Overall, just under a third (30%) didn't see ICFP as applicable to their context; 23% weren't aware of it (made up of largely LA primaries), 20% didn't know (notably at LAMS, 27%) and 16% cited lack of capacity (a percentage consistent across all school and trust types).

Financial benchmarking

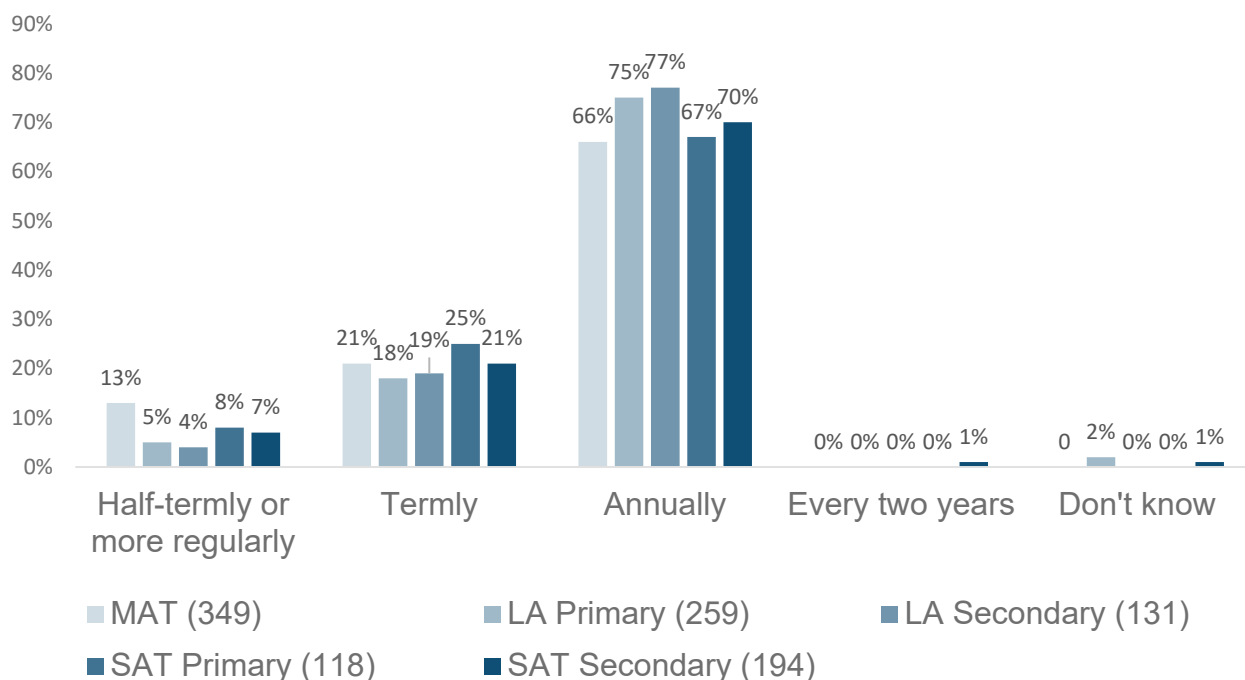
Financial benchmarking refers to the process of comparing the financial performance and efficiency of one school against that of others. This practice allows schools, through their SBPs and other senior leaders, to assess how well they manage their finances and resources compared to similar institutions and involves analysing various financial indicators and key performance metrics to evaluate a school's financial health and identify areas for improvement. It is a tool for continuous improvement and strategic decision-making to ensure that resources are used efficiently to provide the best possible

education for students. The department provides a Schools Financial Benchmarking tool¹⁶ to help support schools / trusts with such activities.

Ninety-two per cent (92%) of all respondents benchmark their income and expenditure. Splitting the data by type and phase of school trust, it is something done by 88% of MATs, 94% of LA primaries, 94% of LA secondaries, 93% of SAT primaries and 97% of SAT secondaries.

Figure 17 below shows how often benchmarking takes place, highlighting that the majority of all standalone schools and MATs will benchmark annually; although MATs are more likely to do it on a more regular basis than SATs and LAMS – 13% of MATs benchmarking half-terminly or more regularly compared to 8% of SATs and 5% of LAMS.

Figure 17: How often a school/trust benchmarks its income



Base: Those that benchmark their income

Use and application of the Schools Financial Benchmarking (SFB) website

The DfE’s School Financial Benchmarking (SFB) website is based on a series of data sets including schools’ Consistent Financial Reporting (CFR) returns for LA maintained schools; academies’ accounting returns (AARs) for trusts; the School Workforce Census; Ofsted data, Special Educational Needs data; and contextual information from Get

¹⁶ Benchmark your school’s financial data - GOV.UK (www.gov.uk)

Information About Schools (GIAS). It shows the position of a school relative to other similar schools.

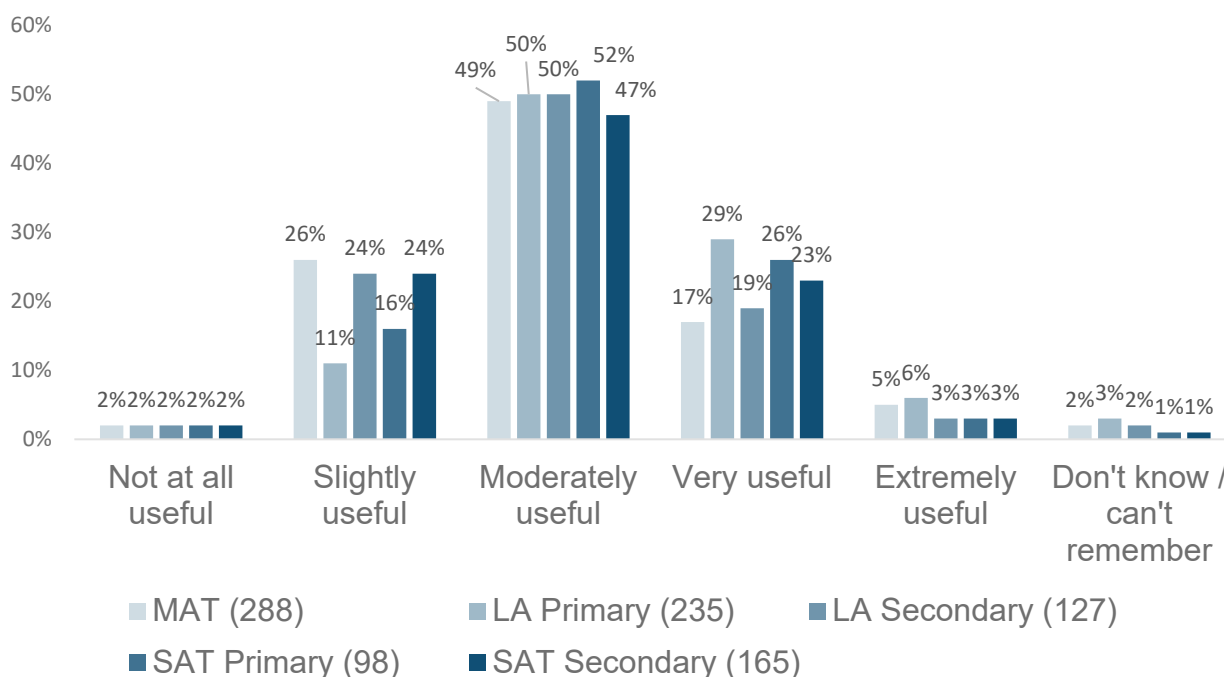
Respondents were asked whether they used the SFB website and, if they did, how useful it was and how they applied its findings. Overall, the majority of schools and trusts use it, LAMS being the most likely to do so (85% for LA primaries and 91% for LA secondaries respectively) (Table 9).

Most (49%) attribute moderate utility to it; just under a quarter (23%) find it very useful, a fifth just slightly useful (19%). Figure 18 below shows the splits by school phase and school/trust type, with 29% of LA primaries, 26% of SAT primaries, 19% of LA secondaries and 23% of SAT secondaries finding it very useful. The level of usefulness has increased slightly since 2021 when 20% felt it was either extremely or very useful compared to 27% in 2023.

Table 9: Use of Schools Financial Benchmarking website

	MAT (396)	LA (P) (277)	LA (S) (139)	SAT (P) (127)	SAT (S) (199)
Schools Financial Benchmarking (SFB) website	73%	85%	91%	77%	83%

Figure 18: Utility of the Schools Financial Benchmarking (SFB) website



Base: all those that use the SFB site

How the website/tool is being used provides insight into its utility for its end users. Respondents were asked if their school/trust had taken one or more of nine specific actions after using the SFB site. Table 10 below shows what percentage of schools and trusts who use the site (929 respondents) have undertaken a particular action, comparing this to the proportion who did so in the 2021 SBP survey.

Examining the 2023 data, over half of all users use it to inform budget setting (55%), identify, or reconsider, areas for possible efficiency improvements (57%), compare finances to other schools (69%) and used as part of strategic discussions at governing body or trustee meetings (69%) – all of which have seen percentage point increases in use from 2021 to 2023. More users of the site in 2023 are applying the tool to (a) contact other schools to share information or best practice (up 8 percentage points (pp) from 2021 to 28%) and (b) identify areas for efficiency improvement (up 6pp to 57% in 2023).

Table 10: Actions after using the Schools Financial Benchmarking (SFB) website – all schools and trusts inc. change over time

Action	% taking the action (2021 SBP survey)	% taking the action (2023 SBP survey)	Percentage point change 2021>2023
Used to inform budget setting	42%	55%	+13pp
Used as part of strategic discussions at governing body or trustee meetings	58%	69%	+11%
Contacted other schools to share information or best practice	20%	28%	+8pp
Identified or reconsidered areas for possible efficiency improvements	51%	57%	+6pp
Changed procurement strategy, e.g., using a framework or accessing help outside the organisation	9%	13%	+4%
Changed supplier of a particular good or service	13%	16%	+3pp
Reviewed and aimed to change contractual terms with an incumbent supplier	6%	6%	0pp
Compared finances to other similar schools	86%	69%	-17pp
Used the information to negotiate a contract price	Not asked in 2021	9%	N/A

Base: those who use SFB website, 2023 = 929; 2021 SBP survey base = 712

Use of other SRM tools, resources and guidance and DfE digital services

As noted at the start of the chapter, the department has a range of direct help, tools, and resources to support school resource management with a specific webpage bringing these together. They are resources for school leaders, SBPs, other school staff and governing bodies in all school and trust types, as well as local authorities. Respondents were asked whether certain SRM tools, resources and guidance are used by their school or trust, rather than by them individually.

Table 11 below shows that some SRM tools, resources or guidance are utilised more than others. The Schools Financial Benchmarking (SFB) site – covered in the section above - and View My Financial Insights (VMFI) tool are the most commonly used, and by the majority of school and trust types. The lower use of VMFI in LA schools compared to SATs and MATs is explained by the staggered roll out of the tool¹⁷.

The Good Estate Management for Schools (GEMS)¹⁸ is more likely to be used by trusts than LA maintained schools, reflecting their role as the responsible body. The ICFP guidance use was lowest for LA primaries (13%), which is consistent with findings above where ICFP use is lowest in LA primaries. Just under half of MATs use the guidance (45%), with SAT secondaries (38%) more likely to be using it than LA secondaries (29%).

The School Resource Management Advisor (SRMA) and Capital Advisers Programme (CAP)¹⁹ are targeted support programmes using accredited sector experts to provide peer-to-peer advice to schools and trusts on using revenue and capital funding. Their use percentages across school phase and types, relatively low compared to other services and tools in the table, are to be expected as these are not programmes that all schools and trusts can access readily from school resource management gov.uk pages (unlike the tools listed in the table).

¹⁷ Released in April 2021 for LA maintained schools compared to February 2020 for trusts

¹⁸ Provides advice on effective estate management, inc. assessing current arrangements and where improvements could be made

¹⁹ CAP is designed to help academy trusts increase their estate management capability and improve practice by offering bespoke best practice recommendations from experienced capital advisers, in line with the Good Estate Management for Schools (GEMS) guidance. Following a pilot, CAP part one started in September 2022

Table 11: Use of DfE school resource management (SRM) services and tools

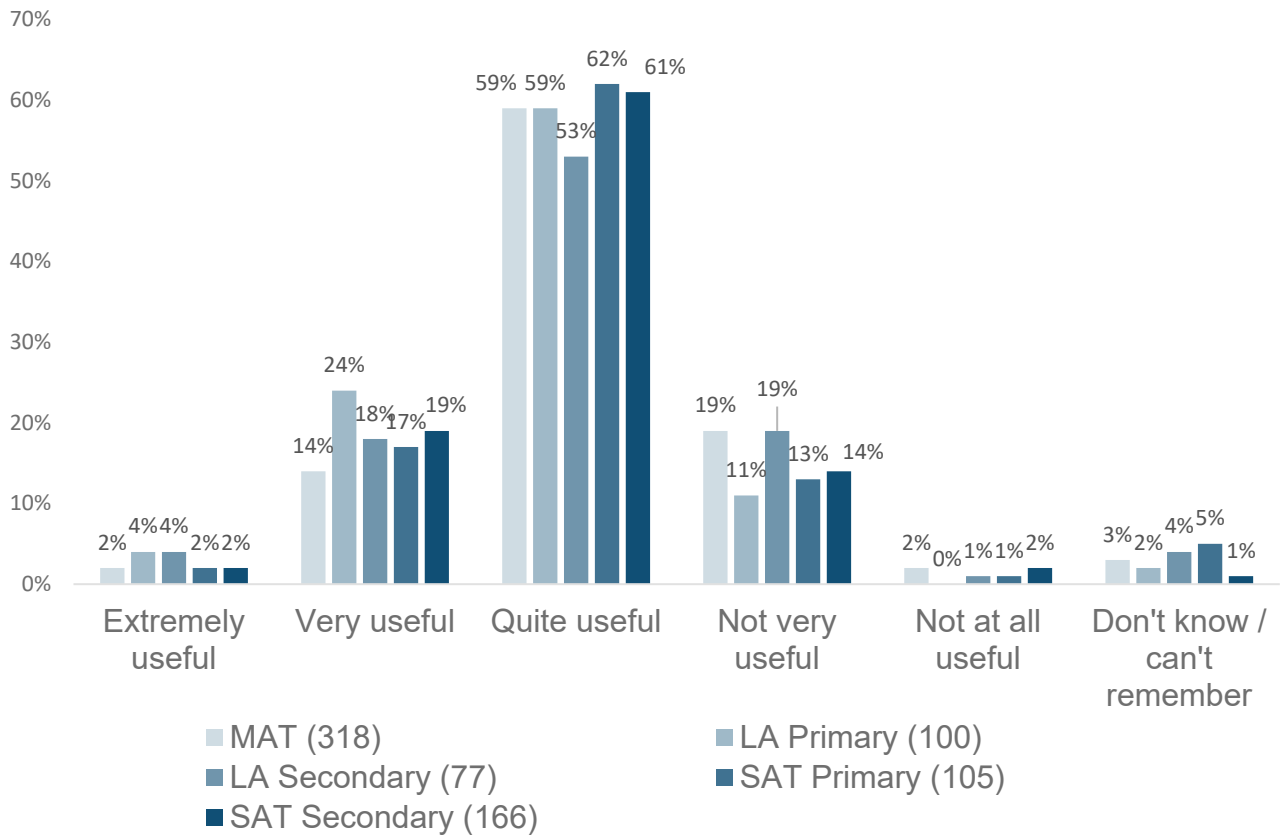
	MAT (396)	LA (P) (277)	LA (S) (139)	SAT (P) (127)	SAT (S) (199)
Schools Financial Benchmarking (SFB) website	73%	85%	91%	77%	83%
View My Financial Insights (VMFI) tool	80%	36%	55%	83%	83%
Good Estate Management for Schools (GEMS)	66%	13%	24%	46%	58%
Get Help Buying for Schools Service	52%	30%	35%	37%	49%
Teaching Vacancies Service	39%	25%	41%	32%	33%
ICFP guidance (gov.uk page)	45%	13%	29%	24%	38%
School Resource Management Adviser Programme	30%	1%	8%	20%	23%
Digital and Technology Standards	11%	4%	13%	4%	9%
Capital Adviser Programme	7%	0%	3%	3%	3%
None of these	3%	4%	4%	2%	3%
Don't know	1%	5%	2%	3%	1%

View my Financial Insights (VMFI)

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

Respondents were asked whether they had personally used the VMFI tool. Figure 19 below highlights the extent of usefulness to those who have. Overall, the majority of VMFI users had a positive view of it, 80% seeing it as at least quite useful, and only 18% as not useful. Whilst there is some variation between groups in the percentages for both these statistics, they are not significantly different (Figure 19).

Figure 19: Usefulness of VMFI



Base: Those who have used VMFI tool

As with the Schools Financial Benchmarking tool above, respondents were asked whether VMFI had been used in one of a series of ways, specific to its functionality (Table 12 below). Nine in 10 respondents have taken some form of applied action after using it. Just under two thirds (61%) have used it as part of strategic discussions at governing body meetings (a 16pp increase from 2021), whilst just under half 47% use it to inform budget setting (a 15pp increase from 2021), as part of strategic discussions with senior leadership team (49%, and a 10pp increase from 2021) and to identify or reconsider areas for possible efficiency improvements (47%, a slight 3pp drop from 2021).

Table 12: Actions taken following use of VMFI by users inc. change over time

Action	% taking the action (2021 SBP survey)	% taking the action (2023 SBP survey)	Percentage point change 2021>2023
Used as part of strategic discussions at governing body meetings	45%	61%	+16pp
Used to inform budget setting	32%	47%	+15pp
Used as part of strategic discussions with senior leadership team (SLT/SMT)	39%	49%	+10pp
Contacted other schools to share information or best practice	12%	17%	+5pp
Identified or reconsidered areas for possible efficiency improvements	50%	47%	-3pp
None / not taken any action yet	22%	12%	-10pp
Used links to the DfE commercial frameworks	15%	Not asked in 2023	N/A
Changed supplier of a particular good or service	Not asked in 2021	9%	N/A
Changed procurement strategy, e.g., using a framework or accessing help outside the organisation	Not asked in 2021	7%	N/A
Used the information to negotiate a contract price	Not asked in 2021	5%	N/A
Reviewed and aimed to change contractual terms with an incumbent supplier	Not asked in 2021	4%	N/A

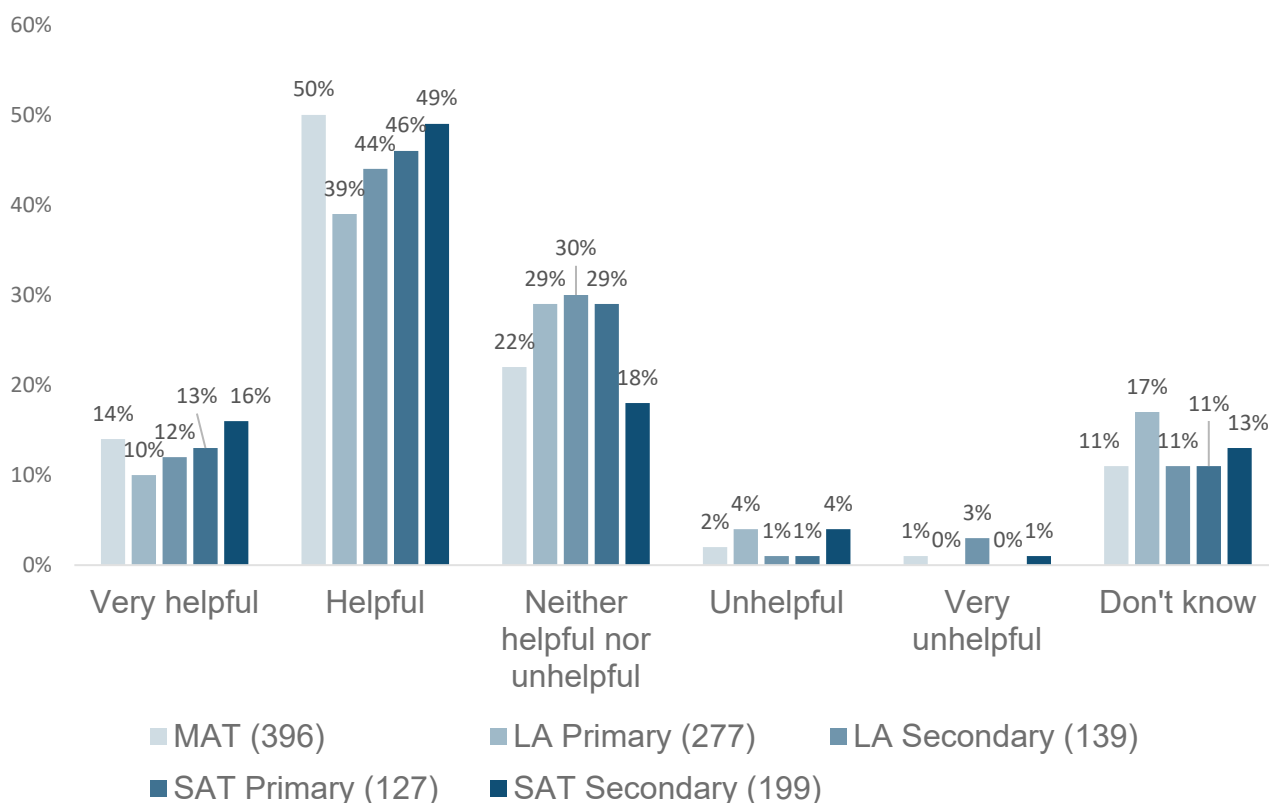
Base: those that have used VMFI (2021) – 390; those that have used VMFI (2023) – 767

DfE’s digital services

There are a wide range of mandatory and voluntary guidance documents, data collections, funding and grant information and other support packages related to digital services available to schools and trusts through DfE gov.uk pages. Collectively, these ‘digital services’ are an important part of how the department ensures schools and trusts have relevant information and support to fulfil their roles. Respondents were asked how helpful they found department digital services in their role.

Overall, most (58%) find DfE digital services at least helpful in their role²⁰. Splitting that down by phase and type of school/trust (Figure 20 below) just under two thirds of SAT secondaries (65%) and MATs (64%) find them helpful, with lower utility for LA primaries (49%), LA secondaries (56%) and SAT primaries (49%). Overall, twenty-five per cent do not have a firm position seeing them as neither helpful nor unhelpful, four per cent found them unhelpful²¹ and 13% didn't know.

Figure 20: Helpfulness of DfE digital services to respondents



Base: All respondents

Some of the digital services provided by DfE include mandatory data returns, such as the school census. Respondents were asked how much time (in aggregate) they estimate they spend searching for, reading about, and completing mandatory returns to the department (Figure 21).

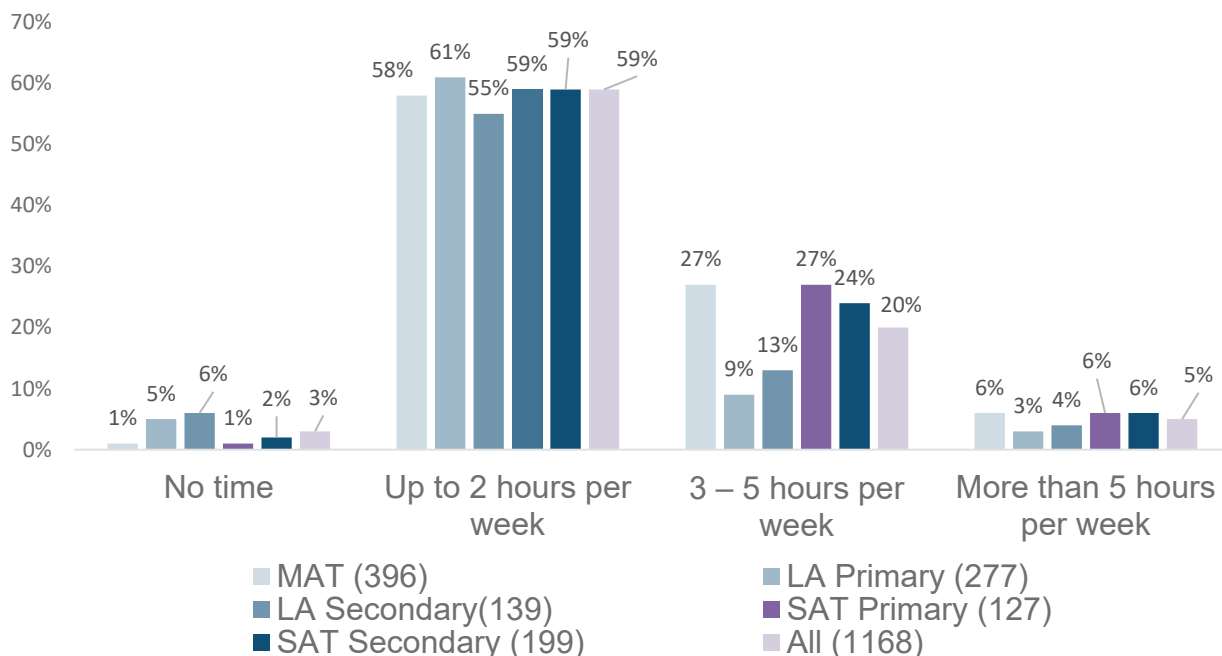
Around 6 in 10 of respondents spend up to 2hrs per week (overall figure is 59%, with little phase and type of school / trust variation) and 2 in 10 spend between 3-5 hours (overall figure is 20%, with LA schools, spending less time than both phases of SATs, and

²⁰ This is net helpful (helpful and very helpful combined), overall.

²¹ This is a net unhelpful figure (unhelpful, very unhelpful)

MATs). Five per cent spend more than 5hrs per week and around 1 in 10 do not know (9%)²² .

Figure 21: Estimated time spent searching for, reading about, and completing mandatory returns



Base: All respondents

Digital and technology standards are guidelines to support schools to use the right digital infrastructure and technology. Meeting them facilitates more informed decisions about technology leading to safer, more cost-efficient practices and new learning opportunities for students²³. The standards can help schools with budgeting for technology procurement and maintenance, buying technology equipment and services, renewing a contract with a technology provider to ensure purchases meet needs, and correctly installing new equipment.

Respondents were asked which digital and technology standards the department should prioritise providing support on, and there is general parity between respondent groups as reflected in the distribution of responses below (Table 13). They felt priority should be on, in order: helping create a secure environment (cyber security, as noted by just under two thirds of respondents), with right hardware (connectivity, as noted by just under half of all respondents) and the right administrative software and cloud operations (just under a third of all responses, respectively). For three of these four priority areas there are

²² Don't know not shown on figure. Figures will not add up to 100% as the response option 'I am not responsible for mandatory returns' is not shown; reporting focus is on those who are responsible

²³ [Meeting digital and technology standards in schools and colleges - Guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/meeting-digital-and-technology-standards-in-schools-and-colleges)

significant differences between standalone primaries and standalone secondaries: cyber security (54% primaries vs 72% secondaries); connectivity (50% primaries vs. 39% secondaries); and cloud operations (25% primaries vs. 32% secondaries).

Table 13: Where DfE should prioritise digital and technology standards support

	LA (P) (277)	SAT (P) (127)	LA (S) (139)	SAT (S) (199)	MAT (396)	ALL (1,168)
Cyber security	51%	61%	68%	75%	72%	64%
Connectivity (broadband, WiFi, network switches)	50%	50%	41%	38%	45%	45%
Administration software (MI, HR, and data management)	33%	26%	31%	30%	29%	30%
Cloud operations	26%	23%	32%	32%	34%	29%
Building-related ICT (door and CCTV security)	26%	21%	19%	23%	17%	22%
Filtering and monitoring	22%	20%	19%	18%	20%	20%
Devices	22%	21%	15%	17%	17%	19%
IT Support and Services	17%	17%	9%	9%	11%	13%
Servers & Storage	15%	12%	14%	13%	10%	12%
IT Governance	5%	10%	19%	11%	15%	11%
Accessibility	8%	3%	8%	3%	2%	4%
Audio visual	1%	2%	2%	3%	4%	3%

Chapter 4: The provision of functions and services within standalone schools (inc. procurement)

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

It should be noted that differences between different phase and types of school shown in this chapter do not mean one type of school is more efficient at providing them, they simply show that one is more likely to have made the decision to provide them using internal expertise and resource than the other.

Key points of chapter:

- Catering, payroll and legal are most likely to be 'completely outsourced' in both standalone primaries and secondaries. Human resources, school improvement services and finance support will tend to be 'partly outsourced' in both also. Procurement will tend to be done in-house ('completed with school') by both types of standalone secondary and primary SATs. Most LA primaries will also undertake procurement within the school, but they are the group (of the five groups consistently reported) most likely to partly outsource it (26% of them do).
- Most respondents feel they are getting fair value, achieving the outcomes they want, and have confidence making buying decisions. However, some do not feel well informed about procurement regulations and feel they spend more time on procurement than they should.
- Both phases of standalone school will access procurement support from different support organisations as needed. LA primaries are more likely than SAT primaries to regularly (net 'often or always') access support from local authorities (42% vs. 15%). Around half of both types of primaries will never or rarely use a public sector buying organisation, another school/MAT and a local school business professional network.
- Whilst LA secondaries are most likely to regularly go to local authorities (32% net 'often or always'), SAT secondaries are less likely to do so as just over half 'never or rarely' go to them and will more regularly use a private company (15% more regularly ('often or always'), public sector buying organisation (16%) or the Get Help Buying for Schools service (15%).

Provision of services and functions within standalone schools

To ascertain how a series of functions and services are provided, respondents were presented with three options: 'completed within the school', 'partially outsourced' and 'completely outsourced'.

Table 14 below²⁴, ranked by services completed within SAT primaries, shows the majority of both types of primary (SATs and LA maintained) will tend to 'completely outsource' Catering, Payroll, Legal and ICT support services, and tend to 'partly outsource' HR, school improvement services and finance support (inc. audit support).

Procurement is most likely to be 'completed within the school', although LA primaries are more likely to enlist help in 'partly outsourcing' (26%) it compared to SAT primaries (5%). SAT primaries are also more likely than LA primaries to provide facilities management (43% compared to 29%) and estates management (64% compared to 35%) from within the school.

²⁴ Percentages won't always add up to 100. The respondent could also select 'N/A' or 'don't know'. These percentages tended to be very small and are not shown.

Table 14: How certain functions are provided by standalone primary schools

	LA (P) (277) Completed within school	SAT (P) (127) Completed within school	LA (P) (277) Partly outsourced	SAT (P) (127) Partly outsourced	LA (P) (277) Completely outsourced	SAT (P) (127) Completely outsourced
Procurement	68%	92%	26%	5%	3%	2%
Estate management	35%	64%	50%	32%	15%	3%
Facilities Management	29%	43%	49%	43%	22%	14%
Catering	17%	30%	14%	13%	69%	57%
Human Resources	7%	10%	64%	62%	29%	28%
School improvement services	9%	6%	55%	50%	32%	39%
ICT support services	5%	5%	43%	43%	52%	53%
Payroll	2%	2%	46%	41%	51%	57%
Finance support inc. audit	6%	3%	59%	59%	35%	38%
Legal	2%	2%	23%	18%	70%	73%

Looking at standalone secondaries (Table 15 and ranked by services completed with SAT secondaries), both types will also tend to ‘completely outsource’ catering, payroll, and legal, similar to the approaches of standalone primary schools. Both types of secondary will tend to ‘partly outsource’ HR, school improvement, and finance support, which again is similar to the approaches of standalone primaries.

Table 15: How certain functions are provided by standalone secondary schools

	LA (S) (139) Completed within school	SAT (S) (199) Completed within school	LA (S) (139) Partly outsourced	SAT (S) (199) Partly outsourced	LA (S) (139) Completely outsourced	SAT (S) (199) Completely outsourced
Procurement	87%	80%	10%	19%	2%	1%
Estate management	50%	65%	33%	32%	14%	4%
ICT support services	57%	59%	29%	23%	14%	18%
Catering	34%	36%	7%	2%	58%	62%
Human Resources	25%	36%	68%	59%	6%	5%
Facilities Management	35%	29%	45%	53%	20%	18%
Payroll	4%	14%	40%	40%	55%	46%
Finance support inc. audit	17%	11%	62%	58%	21%	31%
School improvement services	6%	10%	66%	61%	26%	19%
Legal	0%	4%	31%	21%	68%	74%

Focusing on the likelihood of functions being ‘completed within the school’ (i.e., not partially or completely outsourced) there are two large differences between phases of standalone schools, where one phase of school is more likely to complete within the school than the other. They are: Human resources (32% standalone secondary vs. 8% standalone primaries, and ICT support services (58% secondary vs. 5% primary).

Procurement by standalone schools

Respondents were firstly presented with a series of statements related to procurement and asked the extent to which they agreed or disagreed with them. Most standalone schools feel they are getting fair value (81%), achieving the outcomes they want (85%),

and have confidence making buying decisions (84%)²⁵ (Table 16 below showing net agree figures split by phase and type).

Whilst there are high levels of agreement with these three statements, the extent of agreement falls when asked about procurement regulations: just under half of LA primaries (47%), just over half of SAT primaries, just under two thirds of LA secondaries (63%) and just over two thirds of SAT secondaries (69%) feel well informed about them. In addition, 3 in 10 LA primaries, LA secondaries and SAT secondaries feel they spend more time on procurement than they should. The values are a little higher for SAT primaries at 40%.

Table 16: Agreement (net) with specific procurement statements – standalone schools

	LA (P) (277) Net Agree	SAT (P) (127) Net Agree	LA (S) (139) Net Agree	SAT (S) (199) Net Agree
I achieve the outcomes I want from my procurement activities	81%	87%	88%	88%
I am confident making buying decisions	79%	81%	88%	85%
I get fair value from my schools procurement	77%	80%	82%	87%
I feel well informed about procurement regulations	47%	54%	63%	69%
I spend more time than I should on procurement	30%	40%	28%	29%

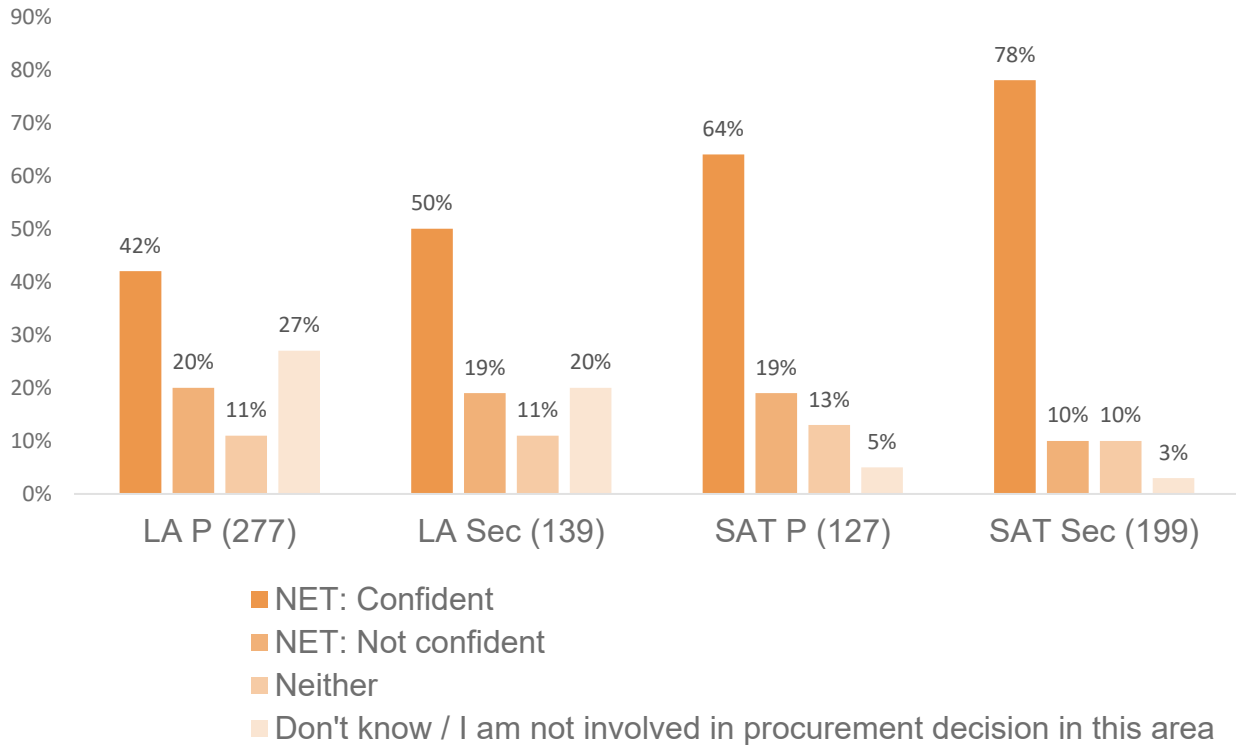
Respondents are confident in procuring from four of five key markets: cleaning, catering, facilities management, and ICT. Overall net confidence²⁶ in procuring from the energy market (60%) – Table 14 below - is lower than the other four areas (Cleaning, 80%; Catering, 77%; Facilities Management, 74% and ICT, 69%), likely reflecting changes in the energy market in the past year as various energy products came into and left the market due to inflationary pressures. Figure 22 breaks down the responses to the energy

²⁵ Overall, aggregate figures for both types of standalone schools

²⁶ It is important to note that not all respondents are involved in purchasing decisions and the figures reflect individual confidence

market question further and shows lower confidence amongst LA maintained schools, both primaries and secondaries, in procuring from the energy market compared to SATs.

Figure 22: Confidence (net) in procuring from the energy market – standalone schools



Base: all respondents

Net confidence in procuring from all five aforementioned markets are shown in Table 17 below, highlighting the variability in confidence between phase and type of school. With the exception of cleaning, it shows slightly lower confidence for LA primaries in procuring in the four other areas compared to other phases and types of school/trust. The large proportions of respondents from LA maintained schools (27% in LA primaries and 20% in LA secondaries) that ‘don’t know / are not involved in energy procurement may explain the reasons for such differences.

Table 17: Confidence (net) in procuring from different markets – standalone schools

	LA (P) (277) Net confidence	SAT (P) (127) Net confidence	LA (S) (139) Net confidence	SAT (S) (199) Net confidence	Overall Net confidence
Energy	42%	64%	50%	78%	60%
Catering	67%	82%	80%	82%	77%
Cleaning	77%	83%	77%	85%	80%
ICT	69%	71%	75%	64%	69%
Facilities Management	69%	78%	78%	81%	74%

Procurement support for standalone schools

Procurement support is available from a number of different organisations, such as private companies, public sector buying organisations, and local authorities. The extent of and frequency of engagement with these different organisations varies. Tables 18 and 19 highlight this in more detail.

Looked at in aggregation, all standalone primary schools will employ a mix of organisations and groups to help with procurement to suit their own circumstance. For primaries (Tables 16), a local authority is most likely to be used followed by a public sector buying organisation. Within this phase, LA primaries are more likely than SAT primaries to regularly (net ‘often or always’) access support from local authorities (42% vs. 15%), and from a Diocesan or national faith support body (10% vs. 2%). Around half of both types of primaries will never or rarely use (a) public sector buying organisation, (b) another school/MAT and (c) a local school business professional network. Occasional use of a private company is more likely in SAT primaries and LA ones (32% sometimes using one vs. 18%).

Table 18: How often standalone primary schools access procurement support from different organisations

	LA (P) (277) Net Often or always	LA (P) (277) Sometimes	LA (P) (277) Net never or rarely	SAT (P) (127) Net Often or always	SAT (P) (127) Sometimes	SAT (P) (127) Net never or rarely
Local authority	42%	36%	21%	15%	46%	38%
A private company (e.g., consultants, brokers)	5%	18%	67%	6%	32%	54%
Public Sector Buying organisation (PSBO)	13%	27%	49%	8%	35%	50%
Get Help Buying for Schools Service	4%	25%	63%	7%	38%	49%
Diocesan or national faith support body	10%	14%	58%	2%	14%	74%
Another MAT or school	8%	28%	53%	12%	31%	51%
A local School Business Professional network or buying group	12%	29%	51%	13%	32%	51%

One story that emerges from Table 19 for standalone secondaries is that most 'never or rarely' access procurement support from the 7 organisations listed. They will 'sometimes' access all of them, likely reflecting the need at the time and which one represents the best support fit.

Whilst LA secondaries are most likely to regularly go to local authorities (32% net 'often or always'), SAT secondaries are less likely to do so; 11% often or always go to them. The majority of SAT secondaries 'never or rarely' go to local authorities (54%), preferring

to more regularly ('often or always') use a private company (15%), public sector buying organisation (16%) or the Get Help Buying for Schools service (15%).

Table 19: How often standalone secondaries access procurement support from different organisations

	LA (S) (139) Net Often or always	LA (S) (139) Sometimes	LA (S) (139) Net never or rarely	SAT (S) (199) Net Often or always	SAT (S) (199) Sometimes	SAT (S) (199) Net never or rarely
Local authority	32%	43%	24%	11%	33%	54%
A private company (e.g., consultants, brokers)	7%	33%	58%	15%	55%	29%
Public Sector Buying Organisation (PSBO)	13%	40%	44%	16%	44%	37%
Get Help Buying for Schools Service	12%	29%	55%	15%	37%	46%
Diocesan or national faith support body	8%	10%	60%	1%	4%	79%
Another MAT or school	6%	22%	62%	7%	28%	59%
A local School Business Professional network or buying group	9%	37%	52%	14%	35%	48%

Chapter 5: The provision of services and functions within MATs (inc. procurement)

Services provided centrally by MATs to their schools through a top slice²⁷ or on a charged basis are not always directly provided by MAT staff. The MAT will seek the most efficient way of providing services by either using their own staff or by bulk buying on behalf of schools in the MAT if they cannot provide the service themselves. Services and functions offered by MAT central teams, either provided centrally or on a charged basis, can be achieved one of three ways: a) completely outsourced, b) partially outsourced or c) completely provided by the trust.

Key points of chapter:

- Finance support, human resources, school improvement services, procurement, and payroll will tend to be provided centrally from a top slice. Facilities management and catering do not tend to be provided centrally.
- Four areas - procurement, estate management, school improvement services, and human resources - will tend to be 'completely provided' by MAT central team staff (similar to the 2021 SBP survey). ICT support will tend to be 'partly outsourced' by the central MAT team as will facilities management and finance support. Legal, insurance, catering, and payroll tend to be completely outsourced (also similar to the 2021 SBP survey).
- Most feel they are getting fair value, achieving the outcomes they want, and have confidence making buying decisions.

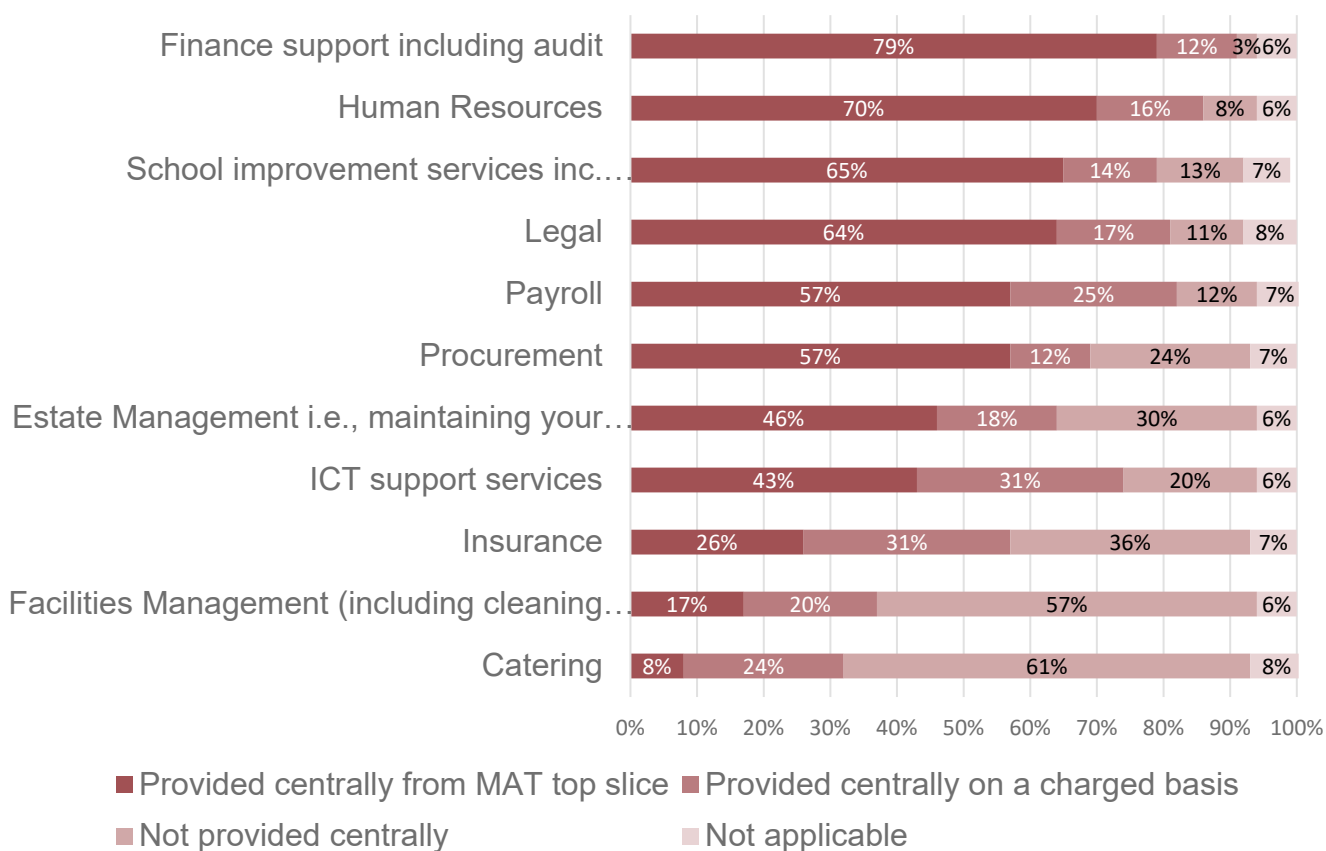
Provision of services within MATs

The majority of the 11 main functions and services are provided centrally from a MAT top slice or centrally on a charged basis (Figure 24). Finance support (79%), human resources (70%), school improvement services (65%), procurement (57%) and payroll (57%) will tend to be provided centrally from a top slice; whilst estate management, ICT and insurance show most variability in how they are provided, either centrally by the MAT from a top slice or on a charged basis.

²⁷ Previous research (Cirin, 2017. Academy Trust Survey) examined the level of “top-slice” (MATs can top-slice a percentage of income from their schools’ general annual grant to fund their operational costs) used by MATs to provide central services and found that most MATs (75%) take a top-slice of each academy’s budget which is used to provide essential services

The two areas where most MATs do not provide the service centrally are facilities management (57%) and catering (61%).

Figure 23: How functions and services are provided within MATs



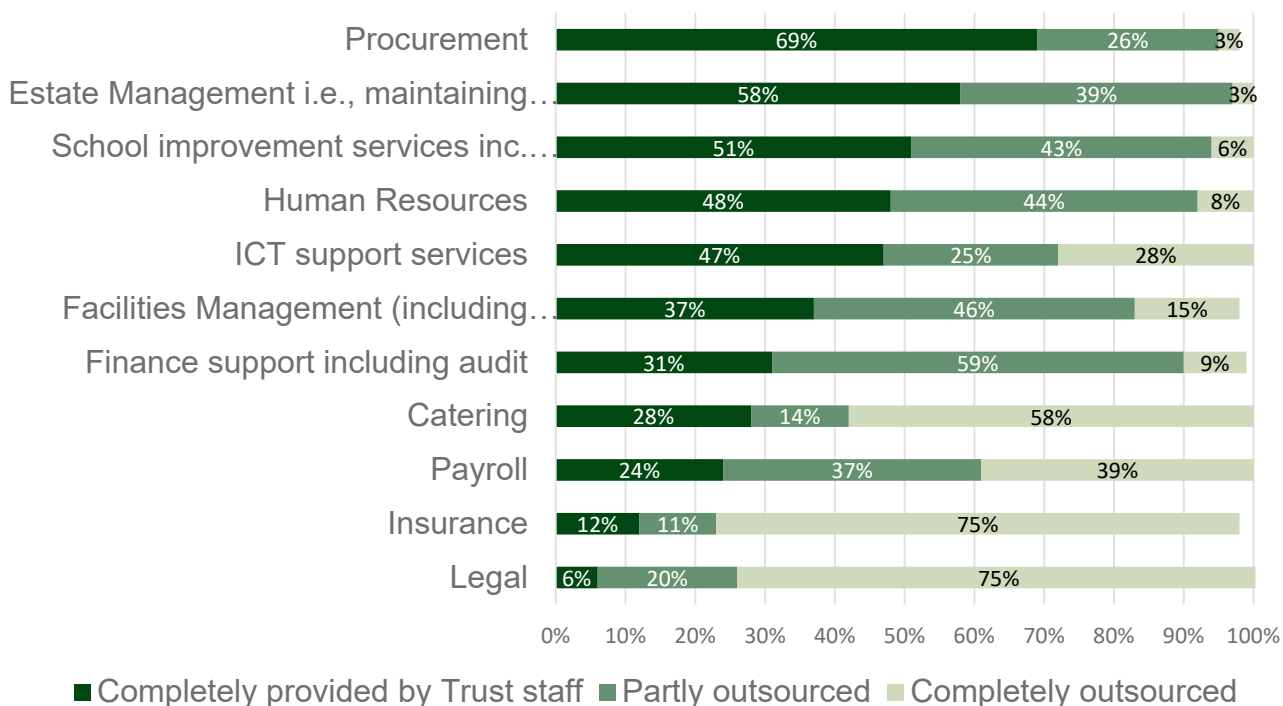
Base = All MATs (396)

Provision provided by MAT central teams

Respondents were asked of the functions that are provided centrally, either from top slice or on a charged basis (i.e., those shown in Figure 24 above), which are entirely provided by central trust staff, and which are partly or completely outsourced. Figure 25 below shows how each service is centrally provided in each of these three categories.

It shows that procurement (69%), estate management (58%), school improvement services (51%) and human resources (48%) will tend to be completely provided by MAT staff; the same areas are noted in the 2021 SBP survey (except HR, which tended to be partly outsourced in 2021). ICT support will tend to be partly outsourced (44%) as will facilities management (46%) and finance support (59%). Legal (75%), insurance (75%), catering (58%) and payroll (39%) tend to be completely outsourced; the same areas as noted in the 2021 SBP survey.

Figure 24: How those services provided by a MAT's central team are delivered



Base = All MATs (396)

Procurement by MATs

Overall, most feel they are getting fair value (83%), achieving the outcomes they want (86%), and have confidence making buying decisions (89%) (Table 20 below), similar to the views of standalone schools. Just over two thirds (67%) feel well informed about procurement regulations, and just over a third (36%) agree that they spend more time than they should on procurement.

Table 20: Agreement (net) with specific procurement statements - MATs

Statement	MATs (396) Net Agree
I achieve the outcomes I want from my procurement activities	86%
I am confident making buying decisions	89%
I get fair value from my schools procurement	83%
I feel well informed about procurement regulations	67%
I spend more time than I should on procurement	36%

Seven of ten financial leads in MATs are confident procuring from ICT and Facilities Management markets. The proportions are slightly higher for catering and cleaning (approximately 8 in 10) (Table 21 below). Confidence in procuring from the energy market, at 69%, is slightly higher than LA primaries, LA secondaries and SAT primaries (as shown in Table 17 above).

Table 21: Confidence (net) in procuring from different markets - MATs

Procurement market	MATs (396) Net confidence
Energy	69%
Catering	83%
Cleaning	81%
ICT	71%
Facilities Management	74%

Procurement support for MATs

As noted in the section above covering standalone schools, procurement support is available from a number of different organisations, such as private companies, public sector buying organisations, and local authorities. Similar to the approaches of standalone schools, MATs will employ a mix of organisations and groups to help with procurement to suit their own circumstances (Table 22 below).

Whilst respondents in LA maintained schools are most likely to use a local authority (see above), a MAT is similar to a SAT in that they are most likely to regularly use a Public Sector Buying Organisation (PSBO) (19% of MATs often or always use one). They are also more likely than LA maintained schools to regularly use a private company (13% MATs vs 6% LAMS), and the Get Help Buying for Schools service (14% vs 7%).

Table 22: How often MATs access procurement support from different organisations

	MATs (396) Net Often or always	MATs (396) Sometimes	MATs (396) Net never or rarely
Local authority	13%	33%	51%
A private company (e.g., consultants, brokers)	13%	54%	30%
Public Sector Buying Organisation (PSBO)	19%	45%	31%
Get Help Buying for Schools Service	14%	51%	33%
Diocesan or national faith support body	3%	9%	72%
Another MAT or school	5%	30%	61%
A local School Business Professional network or buying group	8%	30%	58%

Conclusion

This research has furthered the department's understanding of the school business professional occupation. A continued theme throughout this report, which was also found in previous iterations of this work, is that there are many differences between schools relating to phase and type. Finance appears to have a higher profile within secondary schools, and academies are more likely to have highly qualified finance staff. This is reflected in the job roles of respondents with secondary schools and academies more likely to have finance directors rather than school business managers.

The department will use these findings to identify areas for developing further support for the different types of schools and the various SBP occupations within them. This research shows that actions taken following the 2021 report have improved the usefulness of several of the department's tools, for example the School's Financial Benchmarking and View My Financial Insights tools are now being used more by schools and trusts to improve the operation of their organisation.

Appendix 1

Table 23. Appendix 1: Qualifications held at levels 4, 5 and 6 (all respondents) – Phase and type of school/trust

Qualification and Level	LA (P)	LA (S)	SAT (P)	SAT (S)	MAT
Level 4 Diploma in School Business Management (formerly known as CSBM)	32%	35%	42%	28%	22%
Level 4 CIPFA Accredited Finance training for SBMs	1%	2%	3%	6%	4%
Association of Accounting Technicians - Professional Qualification	9%	9%	14%	10%	10%
Level 4 School Business Professional Apprenticeship	3%	4%	1%	0%	**0%
Level 5 Diploma in School Business Management (formerly known as DSBM)	10%	22%	13%	16%	15%
Degree in a non-financial, business or HR related subject	17%	24%	14%	21%	14%
Degree in a financial, business or HR related subject	14%	24%	17%	22%	31%
Level 6 Diploma in School Business Management (formerly known as ADSBM)	3%	4%	2%	8%	4%

Table 24. Appendix 1: Qualifications held at level 7 and other associated memberships or qualifications (all respondents) – phase and type of school/trust

Qualification and Level	LA (P)	LA (S)	SAT (P)	SAT (S)	MAT
Level 7 Senior Leader Master's Degree Apprenticeship for School Business Professionals	**%	3%	1%	2%	3%
Level 7 CIPFA Certificate in School Financial and Operational Leadership	1%	1%	5%	10%	9%
Masters in a non-financial, business or HR related subject	4%	4%	4%	3%	4%
Masters in a financial, business or HR related subject	1%	12%	2%	8%	11%
Institute of Chartered Accountants in England and Wales (ACA) - Professional Qualification	1%	1%	2%	9%	13%
Chartered Association of Certified Accountants (ACCA) - Professional Qualification	1%	3%	2%	7%	10%
Chartered Institute of Public Finance and Accountancy (CIPFA) - Professional Qualification	**%	2%	2%	%	6%
Chartered Institute for Management Accountants (CIMA) – Professional Qualification	3%	9%	6%	11%	21%
Other - Procurement qualification	1%	2%	2%	1%	2%
Other - Apprenticeship in a financial, business or HR related subject	2%	2%	2%	2%	4%

Table 25. Appendix 1: Qualifications held at levels 4, 5 and 6 - SBM and CFO

Qualification and Level	School Business Manager (SBM)	Chief Financial Officer (CFO)
Level 4 Diploma in School Business Management (formerly known as CSBM)	42%	19%
Level 4 CIPFA Accredited Finance training for SBMs	3%	4%
Association of Accounting Technicians - Professional Qualification	10%	9%
Level 4 School Business Professional Apprenticeship	2%	0%
Level 5 Diploma in School Business Management (formerly known as DSBM)	15%	12%
Degree in a non-financial, business or HR related subject	17%	15%
Degree in a financial, business or HR related subject	16%	31%
Level 6 Diploma in School Business Management (formerly known as ADSBM)	4%	4%

Table 26. Appendix 1: Qualifications held at level 7 and other associated memberships or qualifications - SBM and CFO

Qualification and Level	School Business Manager (SBM)	Chief Financial Officer (CFO)
Level 7 Senior Leader Master's Degree Apprenticeship for School Business Professionals	1%	2%
Level 7 CIPFA Certificate in School Financial and Operational Leadership	4%	11%
Masters in a non-financial, business or HR related subject	3%	3%
Masters in a financial, business or HR related subject	3%	8%
Institute of Chartered Accountants in England and Wales (ACA) - Professional Qualification	2%	14%
Chartered Association of Certified Accountants (ACCA) - Professional Qualification	3%	10%
Chartered Institute of Public Finance and Accountancy (CIPFA) - Professional Qualification	1%	6%
Chartered Institute for Management Accountants (CIMA) – Professional Qualification	5%	24%
Other - Procurement qualification	2%	1%
Other - Apprenticeship in a financial, business or HR related subject	2%	2%



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