



Department
for Education

Survey of school business professionals: 2025

Research report

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Introduction

This report is based on a survey of 785 school business professionals in local authority-maintained schools (LAMs), academies, single academy trusts (SATs) and multi-academy trusts (MATs). It follows previous iterations of the School Business Professional (SBP) survey run in 2021 and 2023. It is different from previous iterations which focused on the financial lead at a school or trust in that this survey was open to all types of school business professional. Participation was voluntary, responses anonymised. The majority of the responses were from school business managers in local authority maintained schools or academies, or chief financial officers and chief operating officers in multi-academy trusts (MATs) and so reporting often reflects this.

The survey asked questions about respondents' skills and experience, role in strategic planning and financial management, as well as exploring other aspects of procurement, income generation and use of integrated curriculum and financial planning (ICFP). 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 survey was not limited to a particular type, or job role, of school business professional but the majority of responses were from school business managers, chief financial officers and chief operating officers.

Groups of interest referred to throughout this report are: primary, secondary, MAT, local authority maintained school and academies. Some survey questions for these groups were specific to the respondent personally, e.g., their qualifications or their involvement in strategic planning, other questions were focused on the school or trust operations or practice. 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 business professional
- DfE – Department for Education
- SAT – single-academy trust
- MAT - multi-academy trust
- LAMS – local authority-maintained schools (i.e., LA primaries and LA secondaries as a group)
- Trusts – refers to both SATs and MATs as a group.
- ICFP – integrated curriculum financial planning
- FBIT – Financial Benchmarking and Insights Tool

- SBM – school business manager
- CFO – chief financial officer
- COO – chief operating officer

School business professionals lead the financial and operational management of schools and trusts and play a vital role in ensuring every child achieves and thrives. SBPs often have responsibility for operational leadership, finance, procurement, estate management, and/or human resources, and this bi-annual survey helps the department understand more about the breadth of these roles and responsibilities, to ensure the support we provide reflects the needs of the profession.

Continuing professional development of SBPs is crucial to support the effective use of resources, ensuring all schools and trusts get the best value and therefore maximise the impact on pupil outcomes. The Department for Education currently provides training and development to SBPs, helping to build capability in local authority maintained schools and trusts. The responses from this survey will help the department assess the health and capability of the profession and understand CPD needs, both in terms of formal qualifications and other CPD such as online training and workshops, shaping future policy.

As with previous surveys, we are also keen to use this survey to assess the utilisation, and impact of some of our tools such as FBIT, or utilisation of, or barriers to approaches such as integrated curriculum financial planning, highlighting what more the department can do to support SBPs and their schools and trusts, in managing resources more effectively.

Summary of the main findings

Chapter 1: Characteristics, responsibilities and intentions of respondents

SBMs in primary schools tend to be generalists covering multiple SBP responsibilities, but with finance as their core responsibility. They are less experienced, relatively speaking, to SBMs in secondaries. Those SBMs in secondaries are also more likely to have an operational leadership role with such differences likely the result of different size settings they work in and the complexity of those. The majority (59%) wish to stay in the profession for at least the next three years. SBMs are more likely to plan to undertake certain SBP specific qualifications in the next three years than CFOs and COOs who tend to engage in more CPD in a given year than SBMs.

Chapter 2: Involvement in school and trust operations

SBMs in secondaries (93%) are more likely to be part of senior leadership teams in secondaries than in primaries (68%). There is also progression in the extent of strategic involvement in workforce deployment as the size and complexity of an educational setting increases: only 21% of SBMs in primaries are involved in 'all' aspects of workforce deployment, compared to 37% of SBMs in secondaries and 43% in CFO / COO positions.

Many respondents highlighted that their school's senior leadership team (of which they were not always a member, see above) tended to concentrate on teaching and learning. As a result, they often felt unable to contribute meaningfully to strategic discussions around the curriculum. For some, this was due to limited familiarity with curriculum components.

Chapter 3: Resource management

The majority (6 in 10) SBPs use the department's Financial Benchmarking and Insights Tool (FBIT). Overall, data suggests it is meeting the needs of most users to a satisfactory degree with it frequently being used in comparative, strategic and efficiency related ways. A significant majority of users use it to compare finances with other schools (86%), with over half (58%) integrating it into strategic discussions to identify or reconsider areas for efficiency improvements (57%), and slightly less than half (44%) in strategic discussions with the senior leadership team of the school or trust.

Overall, 26% of primaries and 60% of secondaries use integrated curriculum and financial planning (ICFP), nearly half (46%) of primaries who responded do not,

compared to 20% in secondaries. Similar proportions plan to use it within the next 6 months (16% primaries and 14% secondaries). The respondents who use ICFP metrics in their financial planning are most likely to do so to a current year +2 year, or current year +3 year, timescale suggests these respondents are using ICFP metrics as part of this financial planning activity. An SBP's lack of training and/or experience (31% of those who don't use ICFP) and governors / trustees / the headteacher not being aware of it (35%) were the two most common reasons for it not being utilised.

Income generation is rarely being the responsibility of one person in a school or trust. The most senior SBP at a school or trust (i.e. a SBM or CFO or COO in a MAT) are most likely to have responsibility for it: 39% of SBMs in primary schools were fully responsible, 52% partially responsible. For a SBM in a secondary, 45% were fully responsible, 45% partially responsible. And for a CFO or COO in a MAT, 26% were fully responsible, 57% partially responsible. Allocating enough resource to income generation, and difficulty in identifying additional funding streams were the two most common barriers.

Methodology

A fifteen minute online survey collected anonymised responses from school business professionals on respondents' skills and experience, role in strategic planning and financial management, as well as exploring other aspects of procurement, income generation and use of integrated curriculum and financial planning (ICFP). The survey took place between 16 June 2025 and 11 July 2025.

An online survey link was circulated to SBPs either directly by DfE or via intermediaries who kindly supported the recruitment process:

1. The Department for Education's weekly newsletter on GOV.UK and monthly SBP Newsletter
2. School Business Professional Network Leaders¹ (with a request they forward to those in their networks)
3. A number of professional bodies and unions including the Institute of School Business Leadership (ISBL) and the Association of School and College Leaders (ASCL) (with a request they forward to their members)

The means of sourcing responses does not allow us to know how many responses (if any) are from the same school or trust. The base sizes, i.e. number of valid responses for each question, will vary in places due to display logic - not all questions were shown to all respondents. Where applicable, routing was based on prior answers or respondent characteristics, for example, school type, job role, or extent of responsibility in a given area. Such instances are noted in the main text.

Approach to quantitative analysis

Only complete responses² were included in the analysis. This ensures that all included respondents had the opportunity to view and respond to the full survey. All participants provided informed consent. Data was anonymised.

Findings are presented by school phase and respondent job role, with responses from multi-academy trusts (MATs) shown where appropriate. No overall weighting has been applied, as comparisons between groups (e.g. by school phase or job role) are presented separately. All figures therefore reflect unweighted data, and no overall averages are reported. National data on the distribution of respondent roles across schools is not available, so responses have not been weighted by role. Readers should note that the

¹ <https://www.gov.uk/government/publications/join-or-create-a-network-for-school-business-professionals/school-business-professional-networks-directory>

² The Department for Education has licenses with Qualtrics to collect survey responses meeting all GDPR requirements

number of responses from each role reflects the survey sample and may not correspond to their prevalence across the wider school system.

Despite the survey being open to all those in a school business professional role, the majority of the responses were from school business managers in local authority maintained schools or academies, or chief financial officers and chief operating officers in multi-academy trusts (MATs) – see respondents job role in Chapter 1. To maintain analytical robustness, in places, and where appropriate given the nature of the question, reporting focuses on two main respondent groups: school business managers from schools and chief financial officers (CFOs, 91 responses) and chief operating officers from MATs (COOs, 30 responses). The latter are combined for reporting purposes only. Whilst their roles are different, they share common strategic oversight of finance and/or operations and are in school business leadership positions. The decision to combine them was made to help improve the robustness of reporting at MAT level. It is done so for the purposes of this report only.

When reporting by phase of school, 'primary' refers to any respondent from a primary or middle deemed primary, whilst 'secondary' refers to secondary, middle deemed secondary, all through and sixth form. This is consistent with department for education statistical reporting practices.

Limitations to quantitative analysis

Despite the survey being available for any SBP to complete, the majority of completed responses were received from school business managers, chief financial officers and chief operating officers. There were not enough responses from other job roles e.g., procurement manager (1 response), estates manager (5 responses) to allow for meaningful subgroup analysis. The survey did not 'force' responses to every question which explains variations in base numbers for some questions.

Approach to qualitative analysis

The survey involved two open questions. The same approach to analysis was applied with both: inductive thematic analysis to identify emergent themes. This approach was chosen as it allows themes to emerge from what is said rather than using pre-determined themes. All responses to the open questions were reviewed and manually coded into categories noted for the question. Some quotes were selected to reflect those categories.

Breakdown of responses – schools and trusts

Table 1: Where respondents work

Organisation type	Number of responses	Proportion of responses
Academy in a multi-academy trust	185	24%
Single academy trust (SAT)	73	9%
Local authority maintained schools	400	51%
Multi-academy trust central team	85	11%
Other	42	5%

Source: 'Where do you work?' n=785

Table 2: Regional breakdown of responses

Organisation type	Number of responses	Proportion of responses
North East	47	6%
North West	135	17%
Yorkshire and the Humber	74	10%
East Midlands	57	7%
West Midlands	88	11%
East of England	41	5%
London	117	15%
South East	150	19%
South West	74	10%

Source: 'What region are you in?' n=783

Table 3: Responses - phase of school split

School phase	Number of responses	Proportion of responses
Primary	413	63%
Secondary	243	27%

Source: 'What is the phase of school?' n=656

Chapter 1: Characteristics, responsibilities and intentions of respondents

This chapter focuses on the respondents: who they are, their experience and future intentions, extent of responsibilities, and qualifications.

Job role of respondents

Table 4 below highlights the job role³ of respondents. Whilst the survey was open to all types of SBPs the vast majority of responses were from school business managers in local authority maintained schools or academies in multi-academy trusts. Responses from MATs were from CFOs and COOs. As noted above in the methodology section, given this distribution findings in the report are predominantly shown by SBM and CFO and COO (combined) (where findings are not shown at phase or trust level).

Table 4: Job role of respondents

Job role	Number of responses	Proportion of responses
School business manager	543	69%
Chief financial officer	91	12%
Chief operating officer	30	4%
Finance manager	28	4%
Trust business manager	17	2%
Estates manager	5	1%
HR manager	7	1%
Office administrator	8	1%
Procurement manager	1	0.1%
Other	55	7%

Source: 'Which of the following best describes your main job role? N=785

Responsibilities

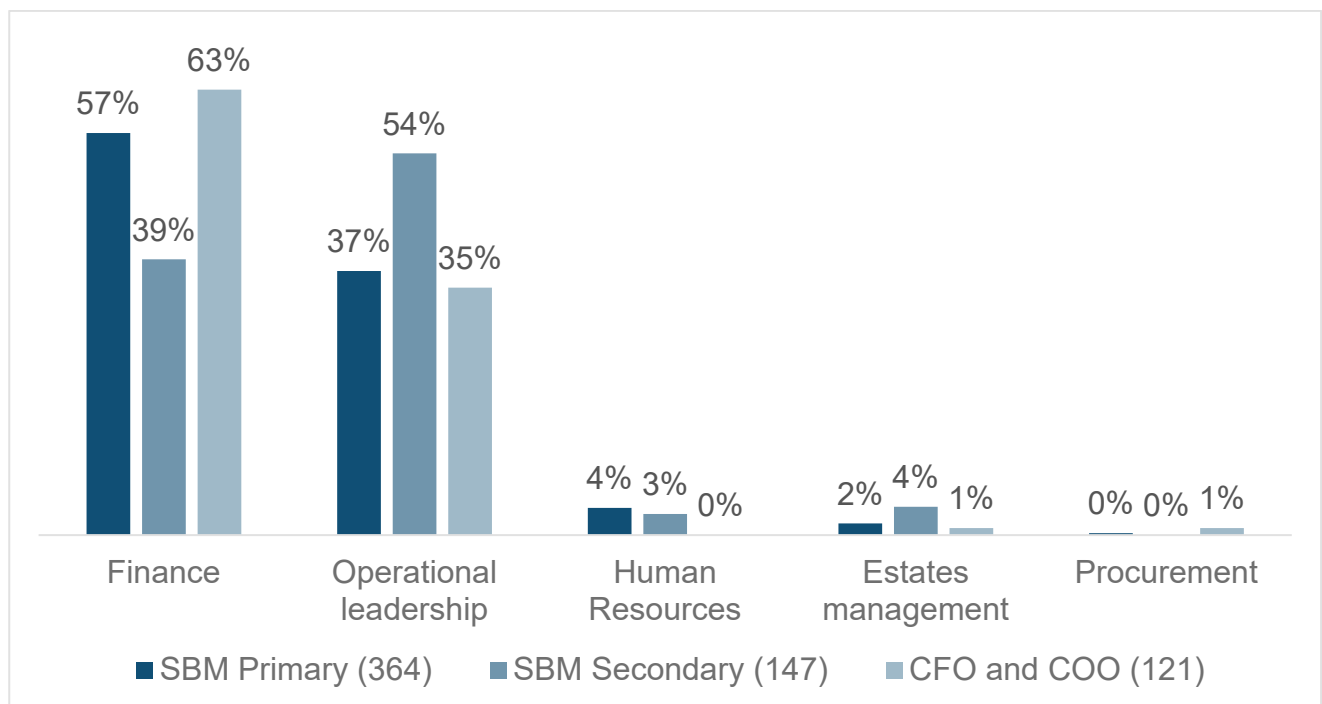
The intention with the question was to obtain a breakdown of responsibilities split by a large range of SBP job roles – to get a sense of how these vary (or not). The low base sizes as noted in Table 4 mean this is not possible. The second reason was to inform

³ This list used reflected common, but not all, school business professional job roles.

whether some subsequent questions were displayed or not. Reporting by different phases of school, and CFO and COO is of most value and is shown.

57% of primary SBMs (Figure 1 below) cite 'finance' as their main responsibility, with 37% operational leadership. These values are almost flipped for SBMs in secondaries with 54% saying operational leadership and 39% finance. On average, secondaries are larger with more facilities, students, staff and support staff making more strategic and operational leadership responsibilities compared to SBMs in primaries more likely.

Figure 1: Primary responsibility of respondent



Source: 'Which of the following best reflects your primary responsibility in your day-to-day role? n=632

Questions in the survey moved on from primary responsibility to the extent of responsibility in each of these five core SBP areas: finance, operational leadership, human resources, estates management and procurement. Results (Tables 5 and 6) are shown specifically for SBMs in primaries and secondaries where the data shows that both tend to act as generalists, with finance as their main, or core, central function, but some variation when it comes to responsibility with HR and operational leadership: on the former, primaries 58% fully responsible compared to 46% in secondaries, and on the latter 64% in secondaries compared to 40% in primaries. Such differences are likely the result of different size settings they work in and the complexity of those.

Table 5: SBM in primary schools - extent of responsibilities in five areas

SBM in primary school	Finance	Procurement	Estates management	Human resources	Operational leadership
Fully responsible	79%	67%	55%	58%	40%
Partially responsible	20%	32%	40%	39%	45%
Limited responsibility	1%	1%	4%	3%	13%
No direct responsibility	0%	0%	1%	1%	2%

Source: 'To what extent, if at all, are your responsible for finance / procurement / estates management / human resources / operational leadership?' n=364

Table 6: SBM in secondary schools – extent of responsibilities in 5 areas

SBM in secondary school	Finance	Procurement	Estates management	Human resources	Operational leadership
Fully responsible	77%	72%	65%	46%	64%
Partially responsible	22%	27%	32%	46%	34%
Limited responsibility	1%	1%	3%	5%	2%
No direct responsibility	1%	0%	1%	3%	0%

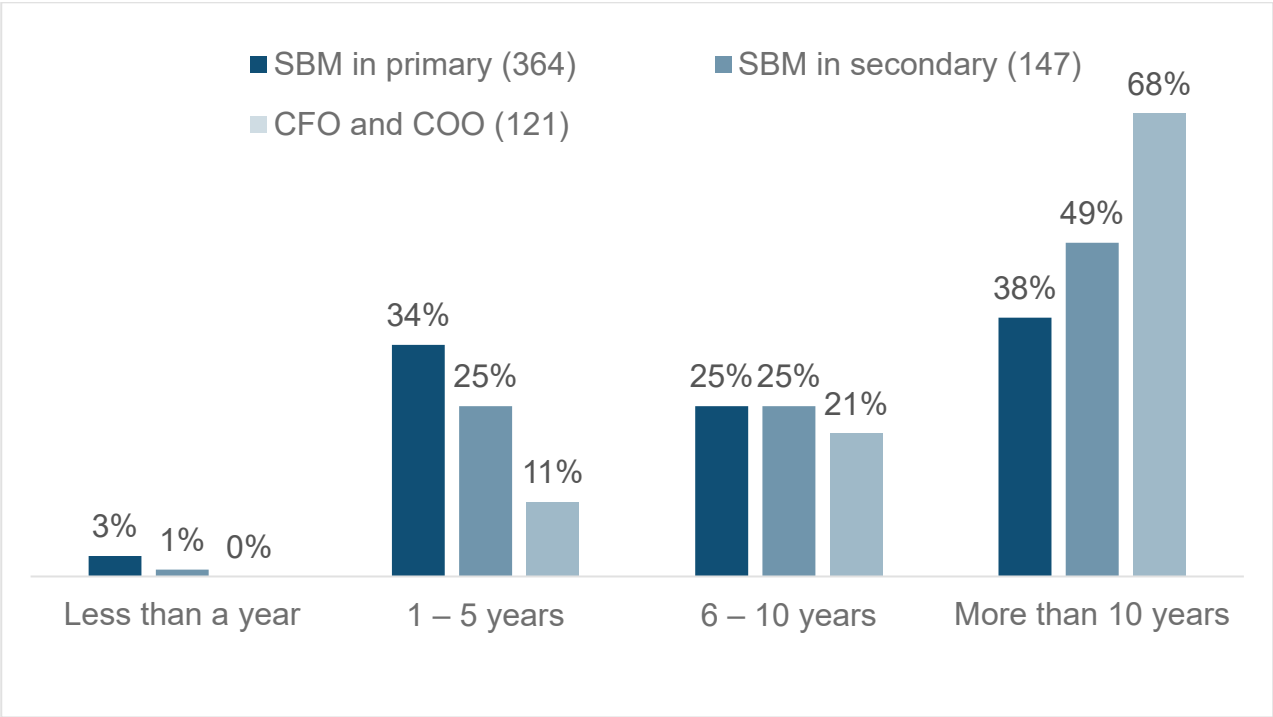
Source: 'To what extent, if at all, are your responsible for finance / procurement / estates management / human resources / operational leadership?' n=147

Extent of experience

The majority of respondents are experienced in the profession, in particular at the CFO and COO level (68% have been an SBP more than 10 years). School business

managers in secondary schools also show a high level of experience (49% have more than 10yrs). The least experienced, relatively speaking, are in primaries. It is important to note that the results shown are not a census of all SBMs and CFOs and COOs, just those who responded. That said, the data suggests an experienced workforce, with greater experience in the most senior positions covering more than one school.

Figure 2: Extent of experience



Source: 'How long have you been a school business professional?' n=632

Intentions to continue working as a school business professional

The majority (59%) wish to remain in the profession (Table 5 below) for the foreseeable future. Whilst not a like-for-like comparison and not tracking the same individuals (i.e. respondents) over a prolonged period, this is broadly similar to the position in 2023⁴. There is some uncertainty with 12% not knowing and 6% wanting to stop as soon as possible. It is worth noting that this latter statistic does not account for those who, for example, may be looking to retire from work. When examined by phase, the proportions broadly mirror the overall position.

⁴ [Survey of school and trust business professionals](#)

Table 7: Future intentions - overall

Plans for future working	Percentage
I want to stop working as a SBP as soon as possible	6%
I want to stop working as a SBP within the next 12 months	10%
I want to continue working as a SBP for at least the next year	13%
I want to continue working as a SBP for at least the next three years	59%
Don't know	12%

Source: 'How long do you plan to continue working as a school business professional?' n=773

Table 8: Future intentions - SBMs in primaries and secondaries

Plans for future working	SBM primary	SBM secondary
I want to stop working as a SBP as soon as possible	7%	6%
I want to stop working as a SBP within the next 12 months	10%	9%
I want to continue working as a SBP for at least the next year	15%	12%
I want to continue working as a SBP for at least the next three years	55%	64%
Don't know	13%	9%

Source: 'How long do you plan to continue working as a school business professional?' n=363 (primary), n=141 (secondary)

Qualifications

Supporting SBPs to develop their skills and knowledge is crucial to enabling them to manage their school and trust resources effectively. Access to high-quality CPD including through formal qualifications where appropriate, can play a big part in this. The department offers a limited number of qualification bursaries for SBPs. Both the questions in this survey and previous surveys will allow the department to understand the current types and levels of qualifications held, and intentions to study. This will not only help us understand the CPD landscape better within the profession but enable us to use this information to improve our training and development offer to the sector.

Respondents were asked whether they hold or intend to study certain qualifications. They did not have to provide a response for each qualification listed (from level 3 to level 7), and multiple qualifications could be selected. As such, the number of respondents who answered (i.e. base size) varies for each qualification in the tables below which are specific for SBMs, and CFOs and COOs. Numbers rather than percentages are shown to ensure clarity. It is also important to note that respondents not selecting a particular qualification, may mean they hold higher level qualifications, or hold qualifications not listed. Equally, low numbers intending to study does not mean a lack of interest in their development as they may be undertaking or planning for other forms of continued professional development (CPD), which is not as formalised as a qualification and there may be other barriers such as available time and cost.

Table 9 and Table 10 below ask about certain levels of qualification and whether those are in a financial, business or HR related subject or not. For SBMs (Table 9) level 4 qualifications in a financial, business or HR related subject are the most commonly held. It is also the qualification most respondents (24) intend to study at some point in the next three years. As might be expected due to different backgrounds and work experiences, learning and training, some SBMs hold non-financial, business or HR related qualifications. Study intentions, however, are more focused in the aforementioned areas at all levels (level 4, 5, 6 and 7), with level 7 (37 responses) being most likely to be studied by those SBMs who responded. The picture with CFOs and COOs shows some similarities but some key differences: level 7 qualifications are most commonly held likely reflecting the seniority of the position and strategic requirements of it; non-financial, business or HR related qualifications are less common; and overall intentions for further certified study is lower. This may imply a focus more on on-the-job learning and more niche CPD related to individual need at that level of seniority. This is reflected in Figure 3 later in this section, where, in a given year, CFOs and COOs will tend to invest more time in continued professional development than SBMs.

Table 9: General qualifications held and intentions to study – SBMs

School Business Managers (both phases of school)	Number who said they hold this qualification	% of SBMs	Number who intend to study for this qualification	% of SBMs
Level 3 or below qualification in a financial, business or HR related subject	143	26%	6	1%
Level 4 qualification in a financial, business or HR related subject	262	48%	24	4%
Level 4 qualification in a non-financial, business or HR related subject	61	11%	5	1%
Level 5 qualification in a financial, business or HR related subject	123	23%	16	3%
Level 5 qualification in a non-financial, business or HR related subject	42	8%	5	1%
Level 6 qualification in a financial, business or HR related subject	93	17%	10	2%
Level 6 qualification in a non-financial, business or HR related subject	69	13%	5	1%
Level 7 qualification in a financial, business or HR related subject	82	15%	37	7%
Level 7 qualification in a non-financial, business or HR related subject	36	7%	10	2%

Source: 'Which of the following qualifications do you either hold or intend to start studying for in the next three years?' SBMs n=543

Table 10: General qualifications held and intentions to study – CFO and COO

CFO and COO	Number who said they hold this qualification	% of CFO and COOs	Number who intend to study for this qualification	% of CFO and COOs
Level 3 or below qualification in a financial, business or HR related subject	32	26%	1	1%
Level 4 qualification in a financial, business or HR related subject	42	35%	3	2%
Level 4 qualification in a non-financial, business or HR related subject	14	12%	0	0%
Level 5 qualification in a financial, business or HR related subject	29	24%	1	1%
Level 5 qualification in a non-financial, business or HR related subject	16	13%	1	1%
Level 6 qualification in a financial, business or HR related subject	23	19%	0	0%
Level 6 qualification in a non-financial, business or HR related subject	13	11%	2	2%
Level 7 qualification in a financial, business or HR related subject	74	61%	6	5%
Level 7 qualification in a non-financial, business or HR related subject	13	11%	3	2%

Source: 'Which of the following qualifications do you either hold or intend to start studying for in the next three years?' CFO and COOs n=121

Table 11 and Table 12 are more specific than Tables 9 and 10 as they ask about specific school business qualifications: whether they hold it and whether they intend to study for it. For SBMs, the Level 4 Diploma in School Business Management is the most commonly held, with 26 intending to study the Level 7 CIPFA Diploma in School Financial and Operational Leadership. Mirroring the position with Table 10 there is not strong appetite for further certified / accredited qualifications from CFOs and COOs.

Table 11: Qualifications - school business qualifications held and intend to study - SBMs

School Business Managers (both phases of schools)	Number who said they hold this school business related qualification	% of SBMs	Number who intend to study for this school business related qualification	% of SBMs
Level 4 School business professional Apprenticeship	47	9%	17	3%
Level 4 CIPFA Accredited Finance Training for SBMs	7	1%	7	1%
Level 4 Diploma in School Business Management (CSBM)	221	41%	20	4%
Level 5 Diploma in School Business Management (DSBM)	73	13%	13	2%
Level 6 Diploma in School Business Management (ADSBM)	31	6%	16	3%
Level 7 CIPFA Diploma in School Financial and Operational Leadership	42	8%	26	5%
Level 7 Senior Leader Master's Degree Apprenticeship for SBPs	21	4%	15	3%
The CIPS Award for School business professionals	10	2%	5	1%

Source: Which of the following school-business related qualifications do you either hold or intend to start studying for in the next three years? SBMs n=543

Table 12: School business qualifications held and intentions to study – CFO and COOs

CFO and COO	Number who said they hold this school business related qualification	% of CFO and COO	Number who intend to study for this school business related qualification	% of CFO and COO
Level 4 School business professional Apprenticeship	3	2%	0	0%
Level 4 CIPFA Accredited Finance Training for SBMs	17	14%	0	0%
Level 4 Diploma in School Business Management (CSBM)	30	25%	0	0%
Level 5 Diploma in School Business Management (DSBM)	20	17%	1	1%
Level 6 Diploma in School Business Management (ADSBM)	7	6%	0	0%
Level 7 CIPFA Diploma in School Financial and Operational Leadership	25	21%	11	9%
Level 7 Senior Leader Master's Degree Apprenticeship for SBPs	3	2%	1	1%
The CIPS Award for School business professionals	2	2%	1	1%

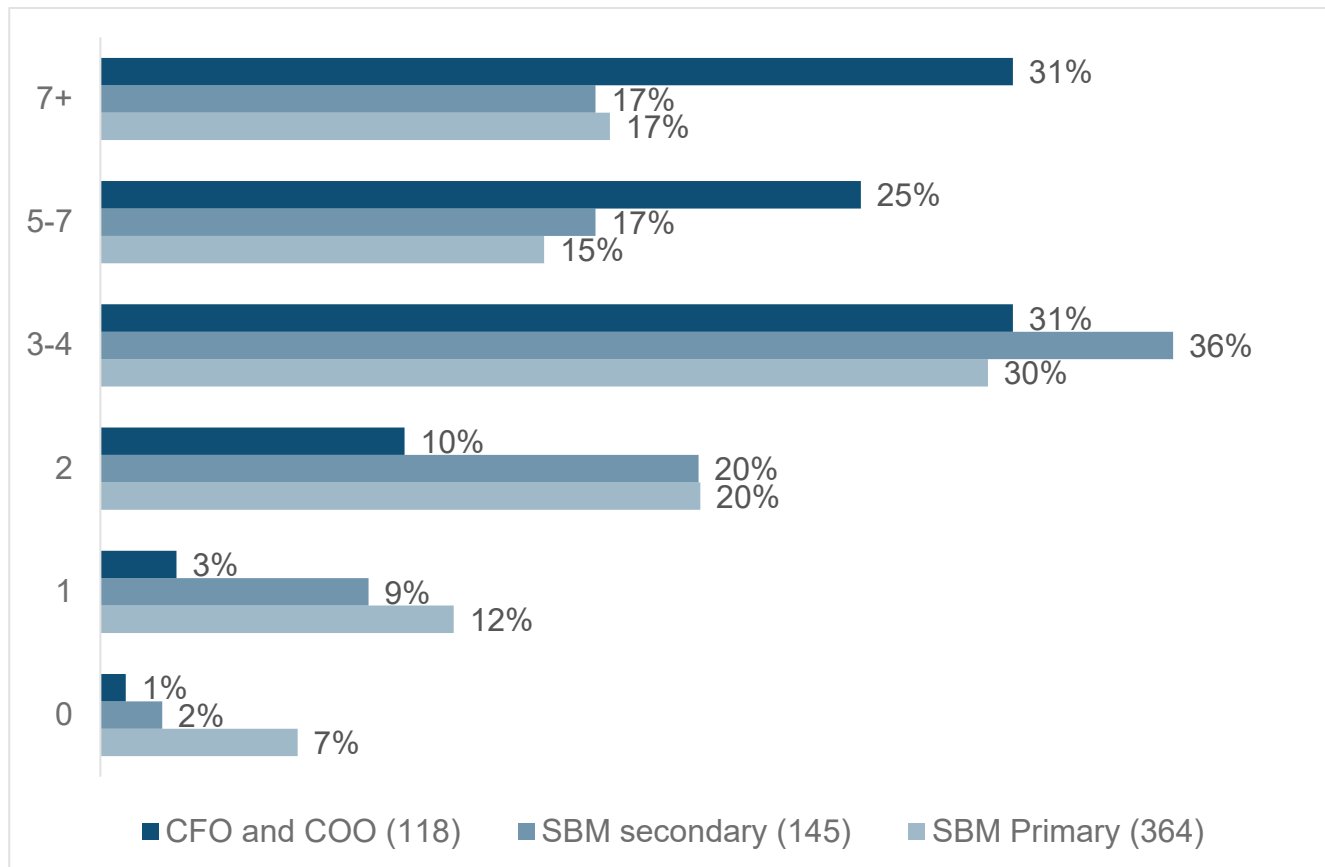
Source: 'Which of the following school-business related qualifications do you either hold or intend to start studying for in the next three years?' CFOs and COOs n=121

Continued professional development (CPD)

Formal qualifications go hand in hand with other quality continuous professional development, but capability comes from additional continued professional development. Respondents were asked how many days on average they spend each year on CPD (Figure 3 below). Whilst not stipulated in the question, CPD can include such things as online training (webinars, short courses), mentoring, peer-to-peer learning, and workshops.

CFOs and COOs tend to spend more time on continued professional development than SBMs. Just under a third of CFOs and COOs spend 7 or more days a year on their CPD, a quarter spend 5-7 days. Most SBMs will tend to take 3-4 days.

Figure 3: Continued professional development days per year

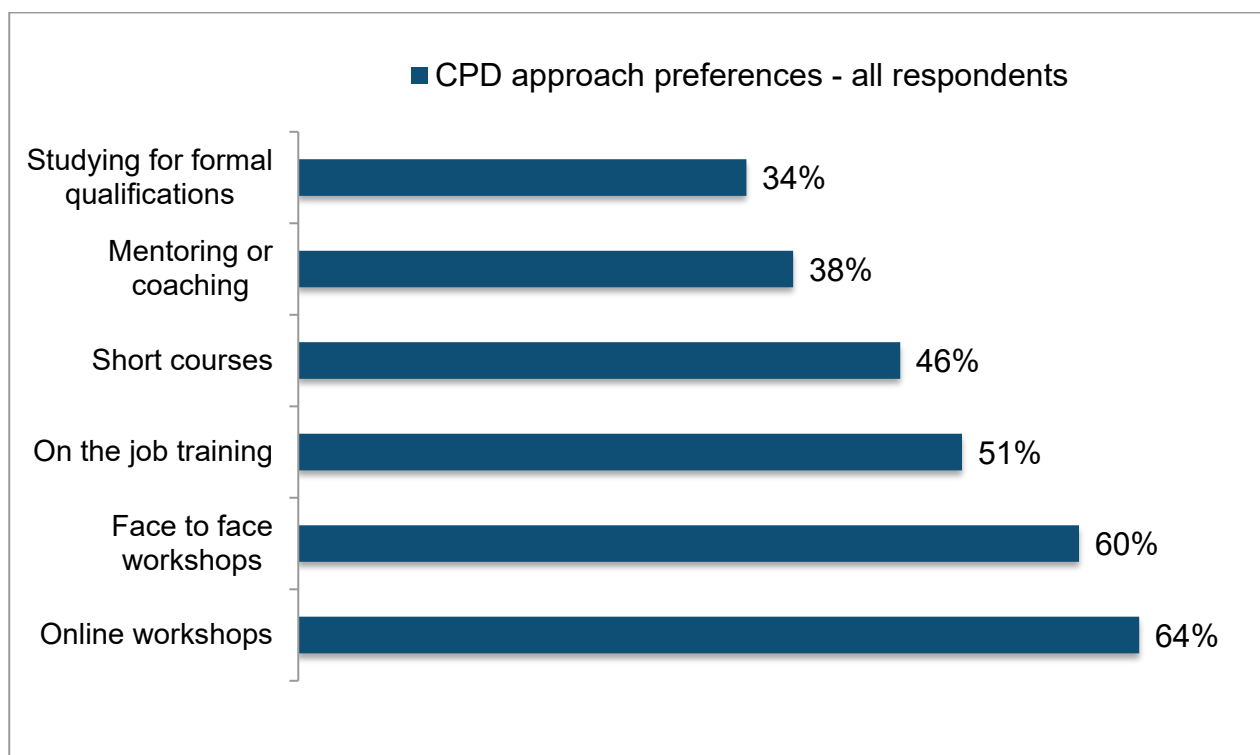


Source: 'How many days do you spend on average each year on your continuous professional development?' n=627

To help inform the preferred medium of future training offers by the department for school business professionals, respondents were also asked which three forms of CPD they find most effective for professional growth (Figure 4 below). It is important to recognise that the question highlights views on the most effective medium, not whether they would do them, a key distinction.

Just under two thirds (64%) of all respondents selected online workshops, 60% face to face workshops and 51% on the job training. Mentoring (38%) and studying for formal qualifications (34%) were the least frequently selected, potentially influenced by the additional time, possibly money and long-term commitment to them. The figures suggest a comparatively lower preference for these modes of learning. Whilst not shown in the chart, there was no notable variance in preference or percentages by type of job role.

Figure 4: Continued professional development – learning preferences



Source: From the following list please select up to three forms of continuing professional development (CPD) you find most effective for your professional growth? N=780

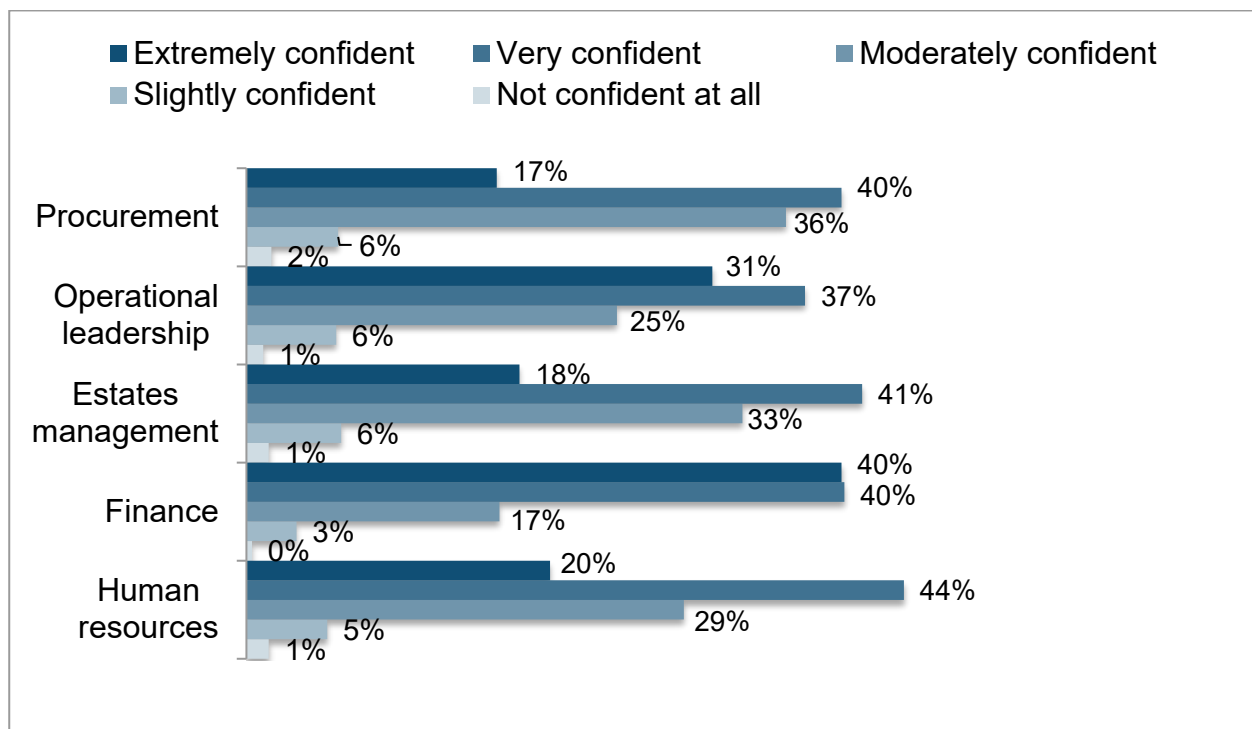
Confidence in key school business profession areas

Finance is the strongest area of confidence amongst both SBMs, and CFOs and COOs. Forty-five percent (45%) of SBMs report being 'extremely confident', 66% for CFOs and COOs. Human resources, estates management and operational leadership show slightly less, but still high levels of confidence levels for both of these types of SBPs.

Procurement is the one area (of the five) where confidence is not as strong, with just over a third (36%) of SBMs 'moderately confident'; the same for CFOs and COOs (37%).

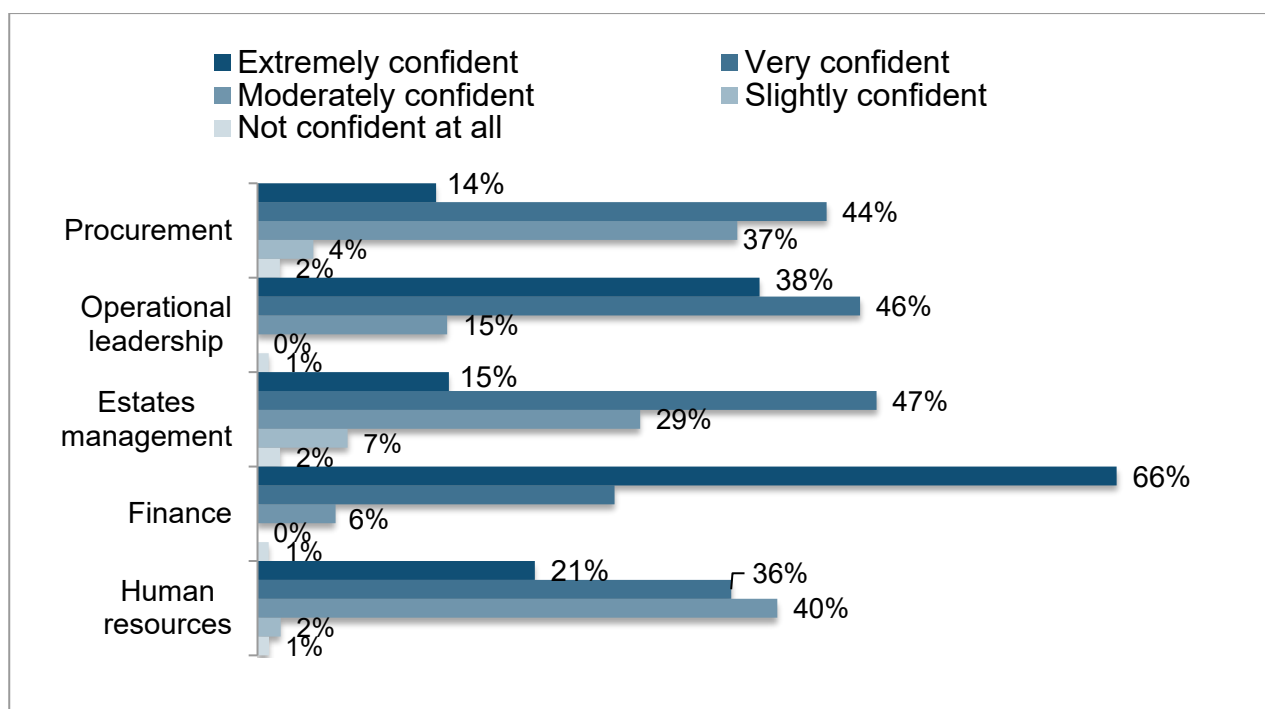
Differences in confidence in operational leadership between the two are slightly evident when it comes to operational leadership (25% of SBMs moderately confident compared to 15% of CFOs and COOs). Figures 5 and 6 below set out the extent of confidence in these areas for these roles.

Figure 5: Extent of confidence in key school business profession areas – SBMs



Source: Considering the responsibilities of your role, how confident do you feel in your ability in the following areas? SBM n=539

Figure 6: Extent of confidence in key school business profession areas – CFOs and COOs



Source: Considering the responsibilities of your role, how confident do you feel in your ability in the following areas? CFOs and COOs n=117

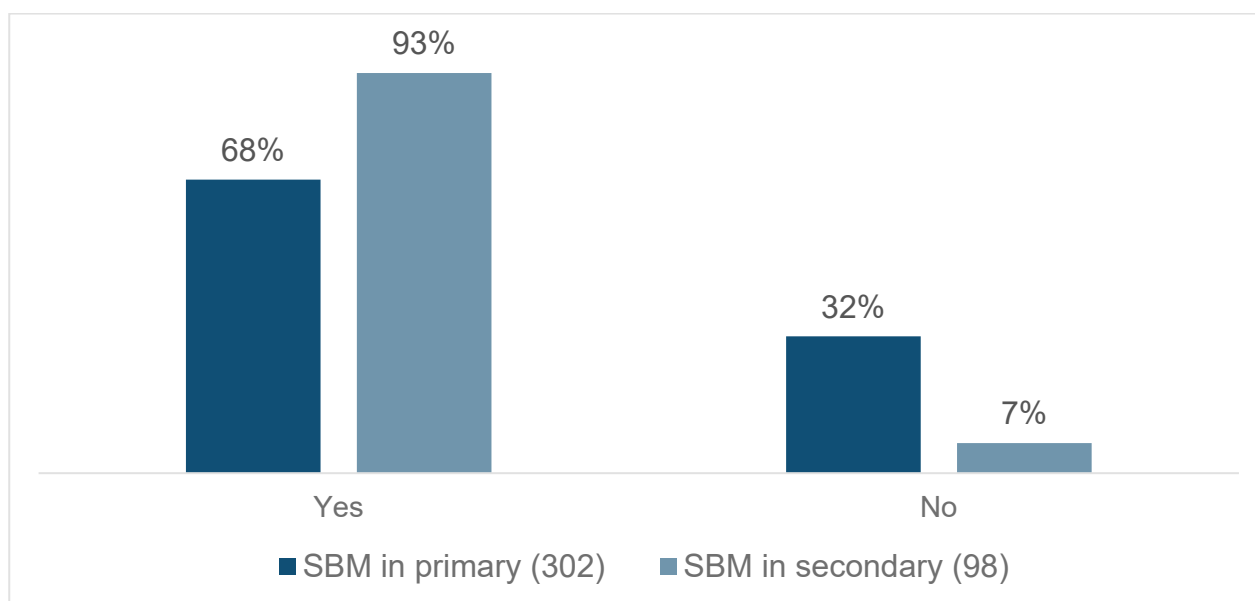
Chapter 2: Involvement in school and trust operations

This chapter explores the extent to which SBMs in both phases of school are involved in planning the strategic direction and workforce planning of their schools or trusts. This is beneficial as it illustrates how the SBP profession is positioned within leadership management structures, and how certain types of SBPs contribute to strategy work. The insight provided into barriers to being further involved is useful to the department's broader aims to help improve SBP capability.

SBM inclusion on senior leadership team of a school

In both phases of school, the majority of SBMs who responded are on the senior leadership team. There is some variation, though, with SBM respondents from secondaries being more likely to be on the senior leadership team (93%) than those in the same position in primaries (68%).

Figure 7: On senior leadership team of your school



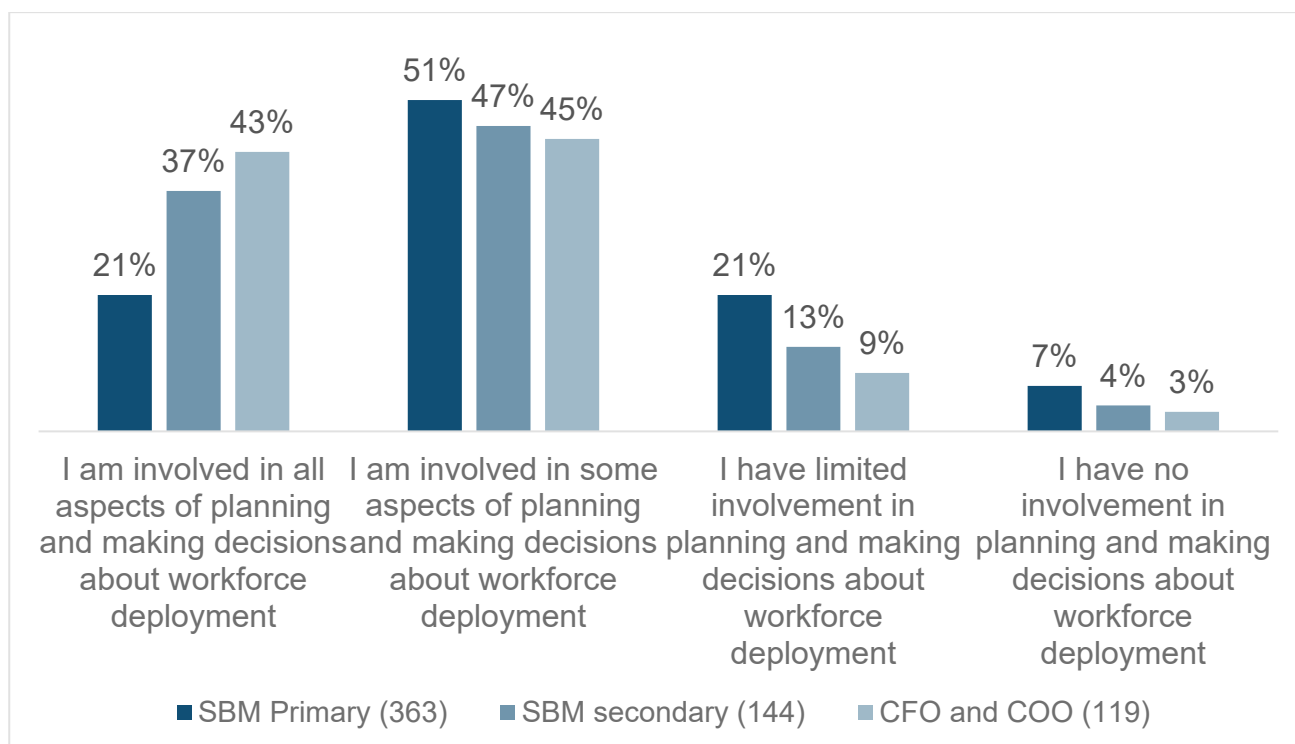
Source: 'Are you on the senior leadership team of the school?' n=302 SBMs in primaries; 98 SBMs in secondaries

Involvement in workforce planning

Figure 8 below shows a progression in the extent of strategic involvement in workforce deployment as the size and complexity of an educational setting increases: only 21% of SBMs in primaries are involved in 'all' aspects, compared to 37% of SBMs in secondaries and 43% in CFO / COO positions. For primaries this could reflect more decision making on workforce planning resting with the headteacher. As Figure 5 above showed, SBMs in

secondary schools are highly likely to be on the senior leadership team, and this may partially explain why they are almost twice as likely to be involved in 'all' aspects of workforce deployment (37%) than SBMs in primaries (21%).

Figure 8: Extent of SBM and CFO / COO involvement in making decisions on workforce deployment

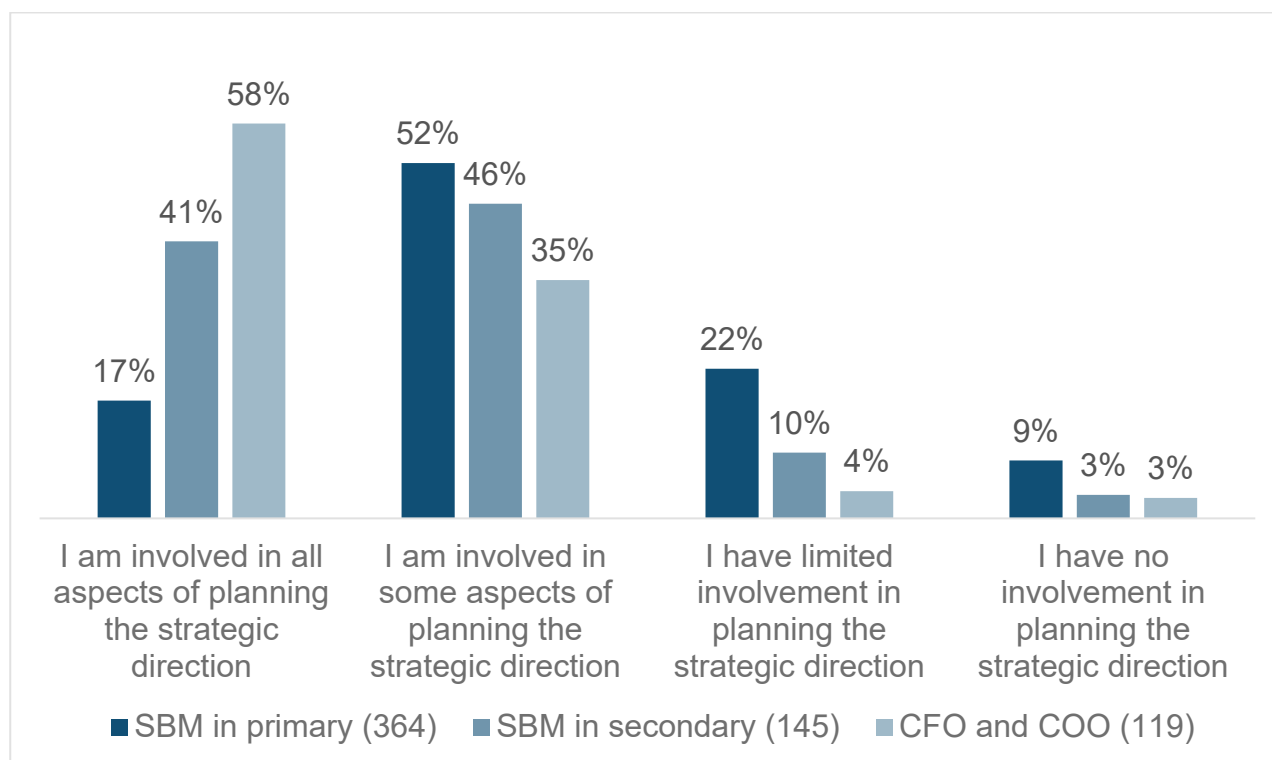


Source: 'Which of the following best describes the extent to which you are involved in planning and making decisions about workforce deployment?' n= 363 SBM primary, 144 SBM secondary, 119 CFO and COO

Involvement in strategic planning

Around 1 in 5 SBMs in primaries (22%) have limited involvement in planning the strategic direction of the school, compared to just over half (52%) involved in some aspects and 17% in all aspects. The picture is slightly different for SBMs in secondaries and likely reflecting the greater proportion on the SLT when compared to SBMs in primaries, 10% have limited involvement, but 87% reported involvement in at least some aspects, with 41% involved in 'all' and 46% in 'some'. The majority of CFOs and COOs are involved in all aspects (58%).

Figure 9: Extent of SBM and CFO and COO involvement in strategic planning



Barriers to more involvement in strategic planning

Only those respondents who had ‘some’, ‘limited’ or ‘no’ involvement in planning the strategic direction were asked ‘What, if any, barriers are there to you or other school business professionals in your school or trust being more involved in planning the strategic direction?’.

In order to segment findings, analysis⁵ below is split into two groups: primaries and secondaries, not MATs as the majority of CFOs and COOs are involved in all aspects of strategic planning.

Primaries

Sufficiency of time, shaped by the breadth of responsibilities across estates, finance, and operational leadership, was the most commonly cited reason for limited strategic involvement. Many respondents noted that their school’s senior leadership team (which they were not always part of—see Figure 5) tended to focus primarily on teaching and learning. This emphasis meant that those who raised this point often felt unable to contribute meaningfully to curriculum-related strategic discussions. In some cases, this was due to limited knowledge of the various components that comprise the curriculum; in

⁵ As noted in the methodology section, inductive thematic analysis to identify emergent themes

others, it stemmed from a view that curriculum strategy was the domain of the pedagogical experts, i.e. teachers and senior leaders. It's worth noting that not all of those who responded to the question expressed a desire to be involved in strategic curriculum matters.

Another frequently cited issue was the perceived limited understanding among senior leaders of the SBP role and the strategic value it can bring particularly in helping bring together curriculum, operational, and resource issues. Several respondents felt that their role was narrowly perceived as just operational, and that greater recognition of the possible strategic insight they could provide was not being utilised.

Secondaries

As with primaries, the most frequently cited barrier to being more involved in planning the strategic direction of the school was time. A second theme was insufficient recognition of the strategic value, and understanding of, the SBM role within senior leadership teams. Many responses expressed the view that what they could contribute was undervalued or insufficiently understood, with others feeling that them not being involved in strategic discussions was due to incorrect assumptions about their limited knowledge of curriculum and pedagogy (although other respondents felt that their lack of knowledge was a barrier and so justified them not being involved in 'all' aspects). Some of those who responded to this question were from secondary academies in MATs, and they noted that the strategic direction was set by the MAT which limited the extent of their involvement.

Chapter 3: Resource management

In this chapter, some questions were not specific to the individual respondent but asked about their school or trust practices. As such, reporting is not always split as in the previous two chapters, i.e., by SBM in primaries, SBM in secondaries and CFO and COO (for the reasons previously noted), but by phase of school. The section covers use of the Department for Education's Financial Benchmarking and Insights Tool (FBIT), income generation, integrated curriculum and financial planning (ICFP) and procurement.

Financial Benchmarking and Insights Tool (FBIT)

Use of FBIT

Around 6 in 10 SBPs (all responses) use FBIT, just over a third (34%) do not – see Table 13 below. It is worth noting that the question focused on individual use (or not), respondents were not asked to make judgements or assumptions on whether any other SBP in their school or trust may have used or be using FBIT. As context, internal metrics show that the school spending page on FBIT has been accessed for 88% of schools between November 2024 and August 2025.

These figures are mirrored for SBMs in primary schools specifically (62% use) and secondaries (56%) and just over a third (35%) of SBMs in primaries and 39% of SBMs in secondaries who do not. Those that do use it were asked how useful they found it, with no significant variation in views between respondents in different phases of school or trust: the majority of respondents viewed FBIT positively, with 48% seeing it as 'moderately useful' and a further 13% as 'very useful'. This suggests that, overall, the resource is meeting the needs of most users to a satisfactory degree. However, just over a third (35%) rated it as only 'slightly useful', suggesting there may be areas where FBIT could be altered to better meet needs of users.

Table 13: Use of FBIT by respondents' specific role

	All respondents	SBM in primary	SBM in secondary	CFO and COO
Yes	61%	61%	56%	73%
No	34%	34%	39%	27%
Not sure	4%	4%	5%	1%

Source: 'Do you personally use FBIT?' N= All respondents (774); SBM in primary (363); SBM in secondary (143); CFO and COO (117)

Application of FBIT

Table 14 below details how FBIT has been used with respondents able to select more than one application. The responses tell a story of, when used, FBIT being used in comparative, strategic, efficiency-related ways: a significant majority of users use it to compare finances with other schools (86%), with over half (58%) integrating it into strategic discussions and to identify or reconsider areas for efficiency improvements (57%), and slightly less than half (44%) in strategic discussions with the senior leadership team of the school or trust. Use of it in areas that are less strategic, and more operational in nature, is more limited with 18% using it to change suppliers, adjust procurement strategies (16%), or negotiate contract prices (10%).

Table 14: Application of FBIT

Nature of application of information from FBIT	Proportion of who use FBIT apply in this way
Compared finances to other similar schools	86%
Used as part of strategic discussions at governing body or Trustee meetings	58%
Identified or reconsidered areas for possible efficiency improvements	57%
Used as part of strategic discussions with senior leadership team (SLT/SMT)	44%
Used to inform budget setting	39%
Contacted any other schools to share information or best practice	23%
Changed supplier of a particular good or service	18%
Changed procurement strategy, e.g., using a framework or accessing help outside the organisation	16%
Used the information to negotiate a contract price	10%
Reviewed and aimed to change contractual terms with an incumbent supplier	5%
None / not taken any action yet	4%
Other	3%

Source: Those who use FBIT. 'To the best of your knowledge, has your school or trust undertaken any of the following actions after using FBIT?' n=471

Integrated Curriculum and Financial Planning (ICFP)

Use of ICFP

ICFP is a process that integrates curriculum planning with financial planning to ensure that schools can deliver a broad curriculum while maintaining financial sustainability. ICFP is applicable to all school phases and school types, and DfE encourages all schools to adopt this approach. The question of its use was asked only of those who earlier

responded that ‘finance’ and ‘operational leadership’ was their primary day-to-day responsibility.

Overall, 42% do, 36% don’t, and 14% don’t currently but plan to within the next 12 months. Variances within this overarching figure exist, though. Amongst primary schools (of both types, LAMs and academies) 26% use it, 16% not currently, but plan to start in the next 12 months, and 46% don’t. Amongst secondary schools (of both types, LAMs and academies) 60% do, 14% don’t currently but plan to in next 12 months, 20% don’t use it. Some of this variance by phase of school may be explained by some of the barriers identified in Figure 11 potentially being more applicable to this group of respondents.

Table 15: Use of ICFP

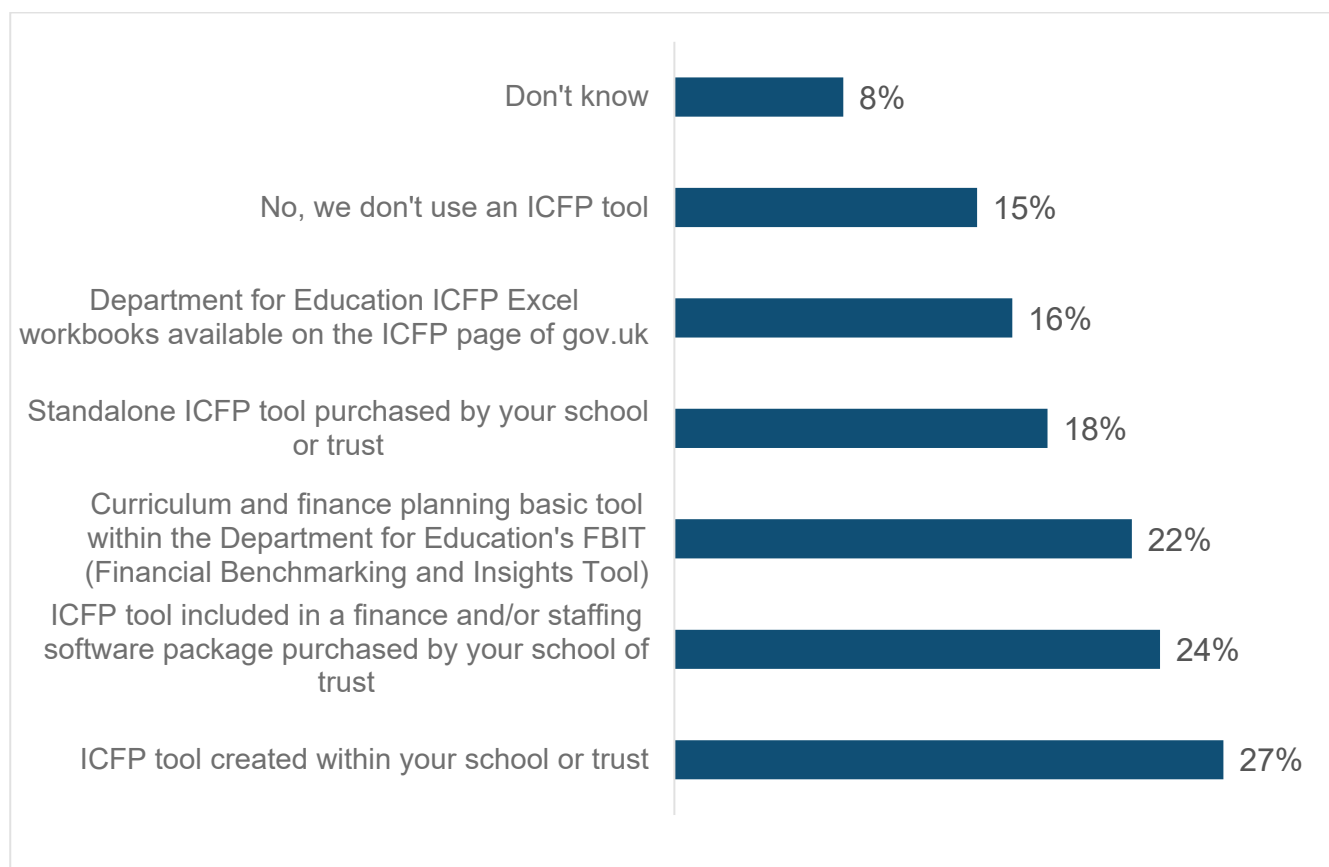
	All respondents	Primaries	Secondaries
Yes	42%	26%	60%
No	36%	46%	20%
Not currently but plan to use	14%	16%	14%
Don’t know	9%	13%	6%

Source: ‘Does your school or trust use a form of ICFP?’ n=774 overall; n=376 primaries; n= 157secondaries

Use of ICFP tools

Those whose schools or trusts do use ICFP were asked which, if any, of a list did they use to produce ICFP metrics. Respondents could select more than one option which is why the percentages in the chart below do not add up to 100%. Overall, the data shows that schools and trusts tend to slightly favour tools created by themselves (27%), or something else they purchased in a finance and/or staffing software package (24%) over the tool within the FBIT site (22%), but these differences are marginal. Some use ICFP but don’t use a specific tool.

Figure 10: What tools/software used to produce ICFP metrics

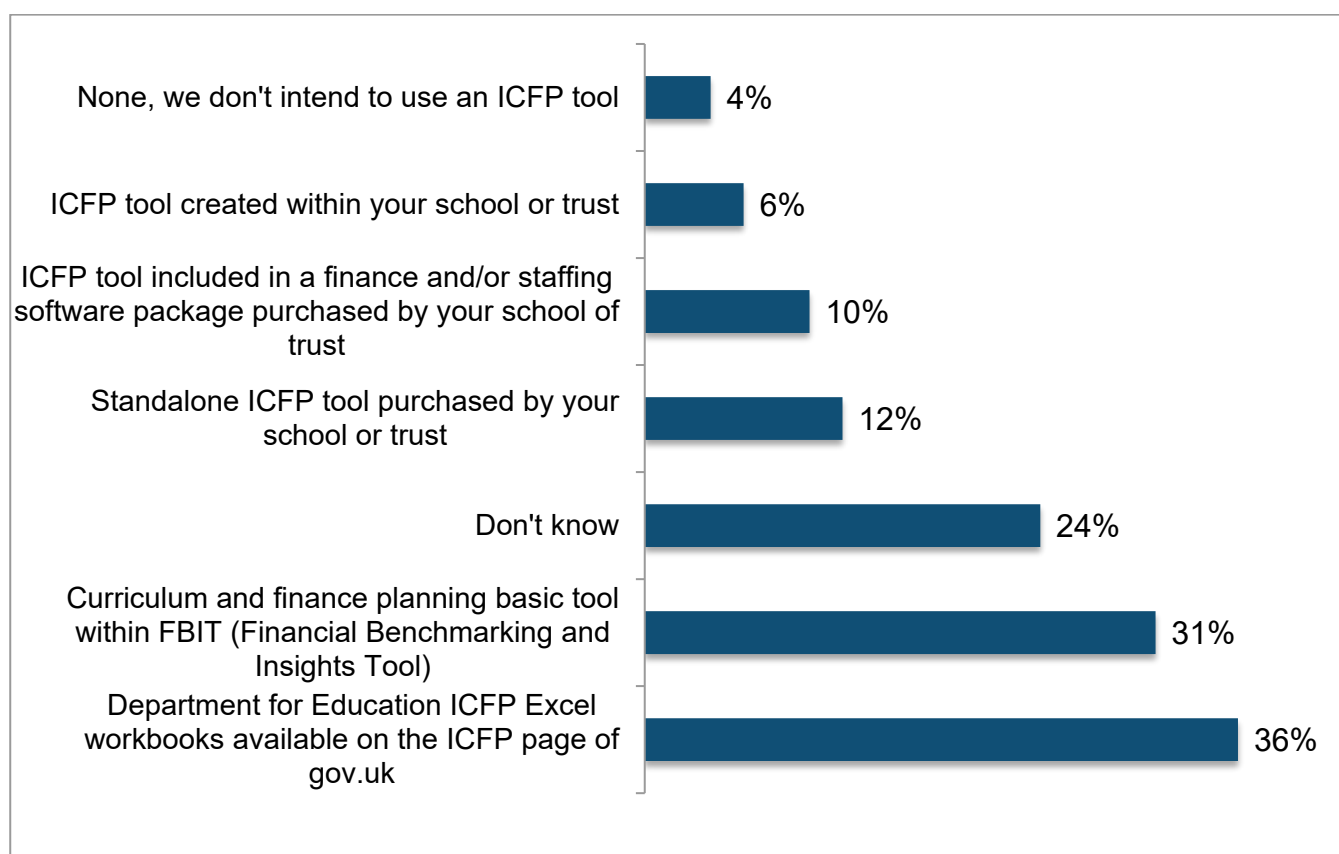


Source: 'Which of the following do you use, if any, to produce ICFP metrics?' n=293

Tools being considered to produce ICFP metrics

A separate question was asked to those who don't currently use ICFP, but plan to within the next 12 months - 100 responses – on what tools they are considering using to produce ICFP metrics. Given this number (100), Figure 11 below presents findings at an overall rather than phase level. It is worth noting that responses are reliant on the respondent having sufficient awareness of ICFP metrics and knowing about options being considered within their school or trust at the time of response. Most referenced the Department for Education (DfE) tools which may reflect a common tendency to favour established, trusted resources when trying a different approach.

Figure 11: [Those not currently using ICFP, but plan to] What ICFP tools are you considering to produce ICFP metrics

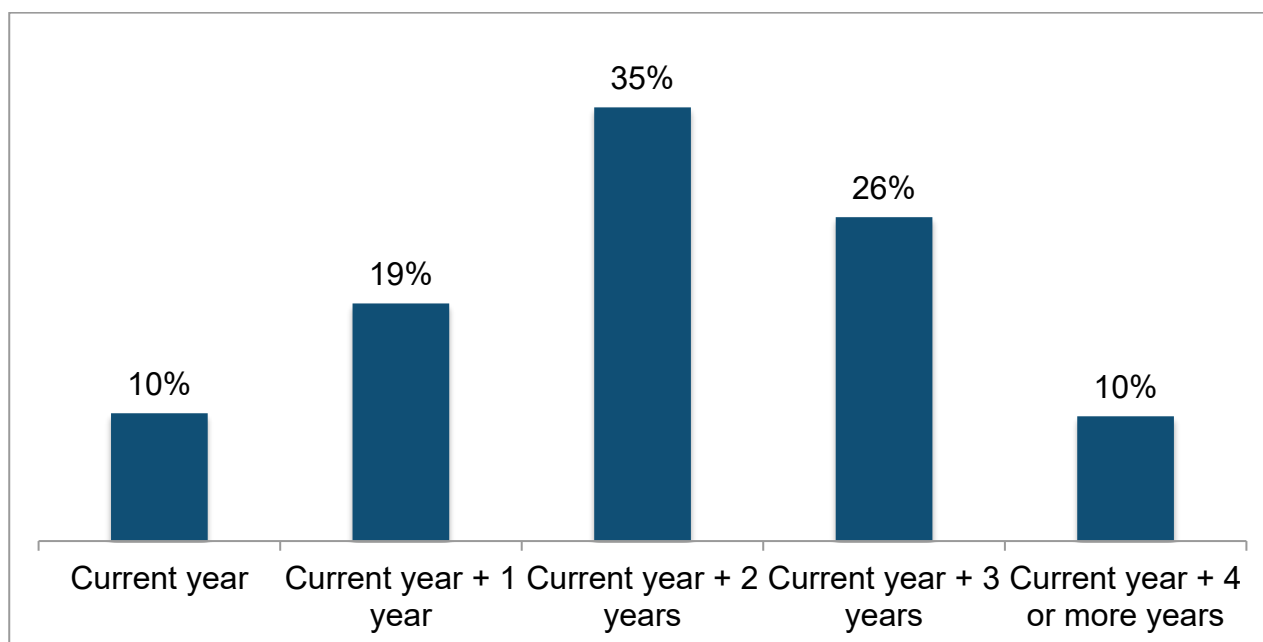


Source: (Those not using ICFP currently but plan to) 'What ICFP tool(s) such as a dedicated piece of ICFP software are you considering to produce ICFP metrics?' n=100

Future financial planning with ICFP

Those respondents whose school or trust does use ICFP and had a primary responsibility of 'finance' or 'operational leadership' (as identified by an earlier question) (Figure 1), when asked how far in advance their school / trust financially plans using ICFP metrics, 35% of schools plan for the current year + 2 years, the highest percentage across all categories. 26% plan for three years ahead using ICFP metrics, and 10% look four or more years ahead. Both academy trusts and LAMs are required to produce 3-year budget forecasts. That respondents who use ICFP metrics in their financial planning are most likely to do so to a current year +2 year or current year +3 year timescale may suggest these respondents are using ICFP metrics as part of this financial planning activity.

Figure 12: [Those using ICFP] How far ahead do you financially plan based on ICFP metrics?



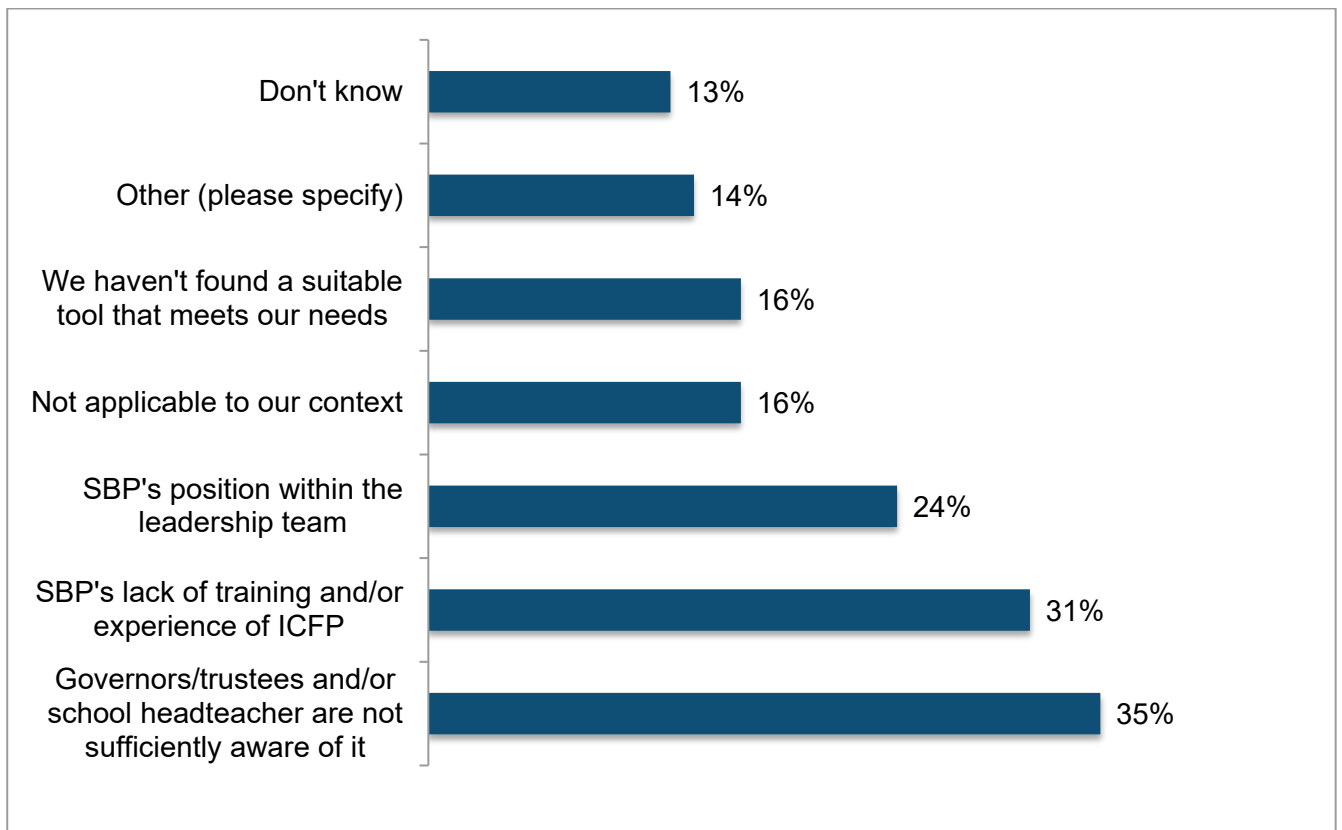
Source: 'How far ahead do you financially plan based on ICFP metrics?' n=420

Reasons for not employing ICFP

Those who don't use ICFP were asked for possible reasons why they don't employ it. They were presented with a series of options to consider and could select more than one reason. An awareness and training issue stands out in the data with just over a third (35%) of those schools and trusts that do not use ICFP not being sufficiently aware of it, and just under a third (31%) of SBPs not having training and/or experience with it⁶.

⁶ To reiterate, this percentage is only of those who do not use ICFP, it does not reflect all SBPs

Figure 13: [Those not using ICFP] Barriers to using ICFP



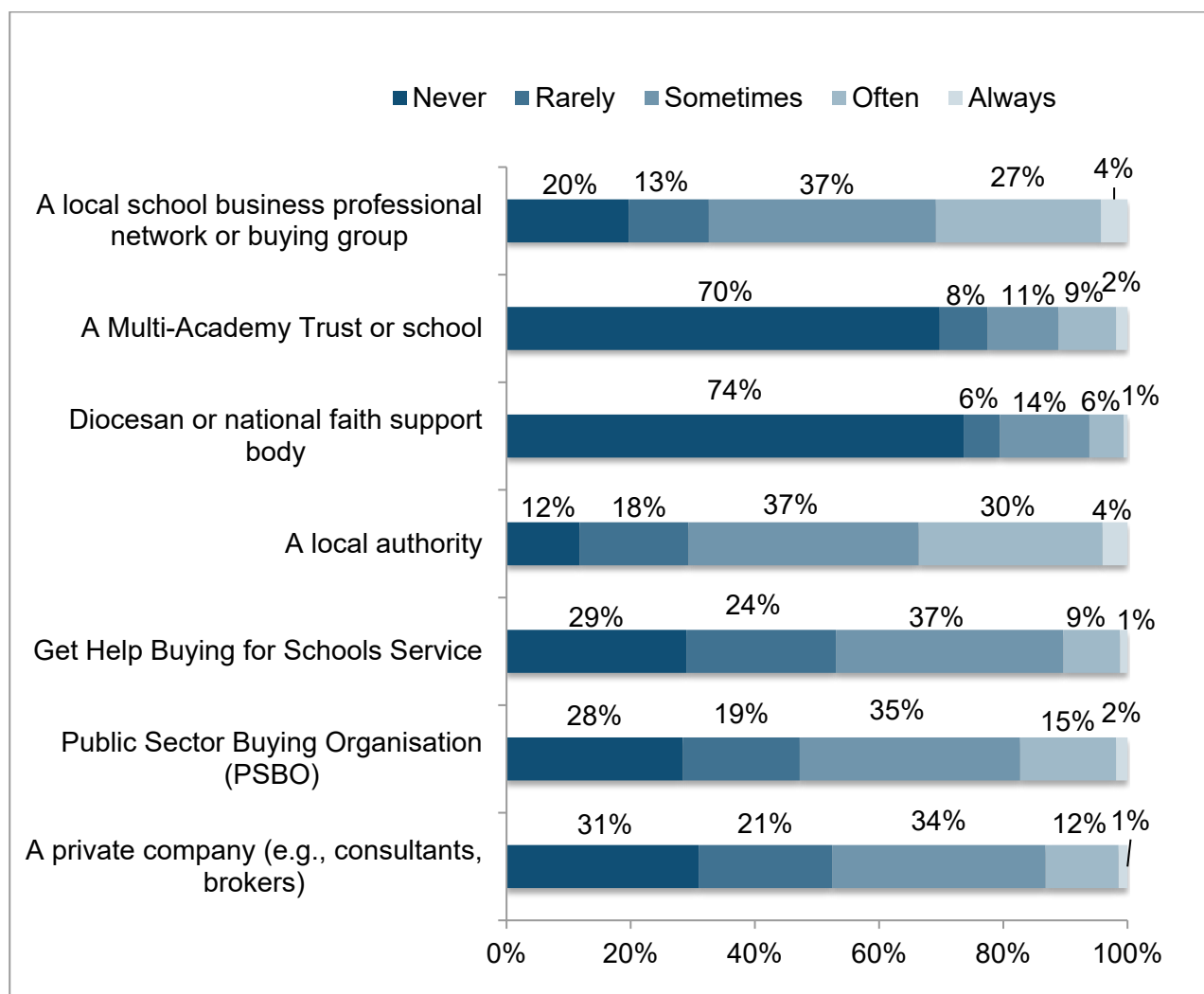
Source: 'What, if any, barriers do you think there are to your school or trust using integrated curriculum and financial planning?' n=248

Procurement

Accessing support

Respondents were asked how often they accessed support with procurement from a variety of sources. This question is best reported by phase of school, to identify any variations between primaries and secondaries. LAs remain the main source of support for primaries: 71% access support from their local authority at least sometimes (37% sometimes, 30% often, 4% always) (Figure 14). They also tend to lean on local school business professional networks or buying groups which could imply supportive networks locally to help make decisions. Whilst some do use the department's Get Help Buying for Schools Service, over half rarely or never do.

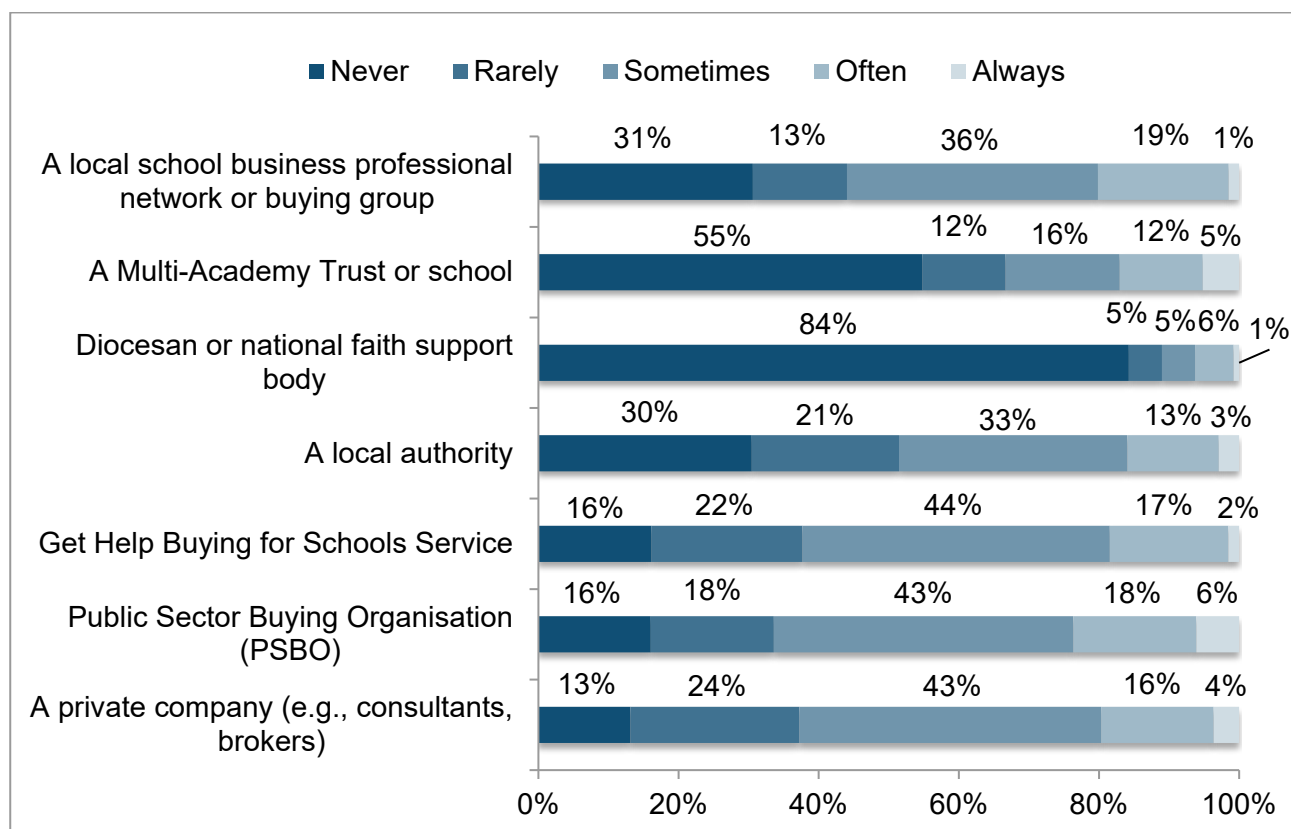
Figure 14: Frequency of accessing procurement support - Primaries



Source: For the procurement of goods and services, how often does your school or trust access support from any of the following organisations? Local SBP network or buying group n= 350 primaries; PSBO n=324; a private company n=349; Get Help Buying for Schools Service n=328; a local authority n=348; Diocesan or national faith support body n=326; A MAT or school n=324

Faith based support is least used by secondaries (Figure 15) and the mixed support from MATs likely reflects the fact the majority of secondary schools are now in MATs and each MAT can have different financial governance arrangements in place, i.e. how centralised vs. decentralised responsibilities on procurement are. Local authorities remain a key avenue of support as the balanced pattern of responses show, and whilst government sources are being used it is moderate, but similar to PSBOs and private companies.

Figure 15: Frequency of accessing procurement support - Secondaries



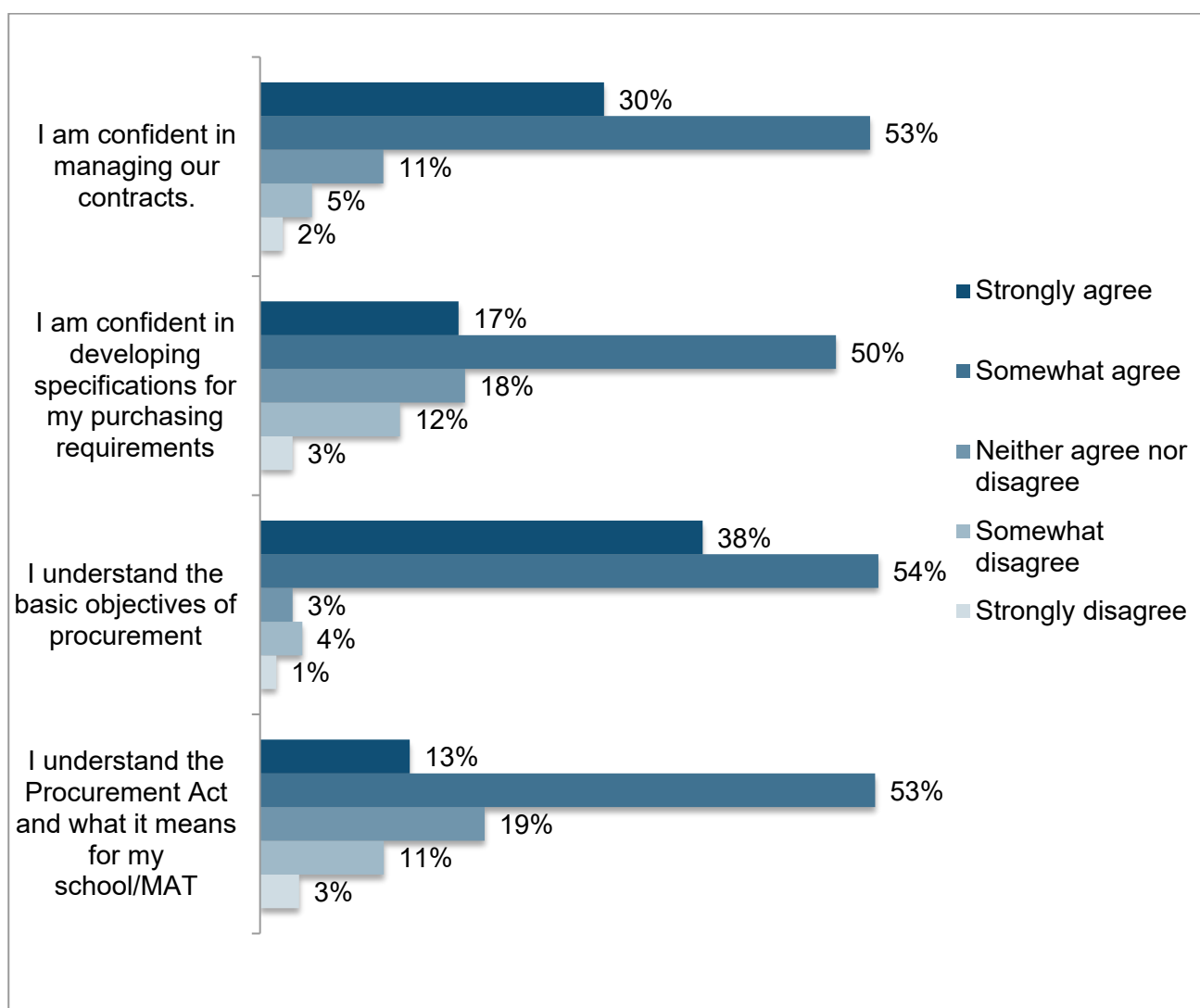
Source: For the procurement of goods and services, how often does your school or trust access support from any of the following organisations? Local SBP network or buying group n= 134 secondaries; PSBO n=131; a private company n=137; Get Help Buying for Schools Service n=130; a local authority n=138; Diocesan or national faith support body n=127; A MAT or school n=135

Procurement practices

Respondents were presented with a series of statements related to procurement practices and asked to what degree they agreed or disagreed with them. As the question was specific to them, not their school or trust, findings are presented by the three main job roles of respondents (as in Section 1).

SBMs in primary schools (Figure 16 below) consider that they have a solid foundation of understanding of key aspects of procurement. Over 90% (92%) at least 'somewhat agree' that they understand the basic objectives of procurement which is a good starting point in terms of competency. This broadly positive starting state of confidence is also reflected in the proportions 'somewhat' or 'strongly' agreeing they are confident in managing their contracts. However, their understanding of the Procurement Act is limited (13% strongly agree they understand it and its implications) which suggests either they aren't aware enough or if they are aware, they aren't particularly certain about it.

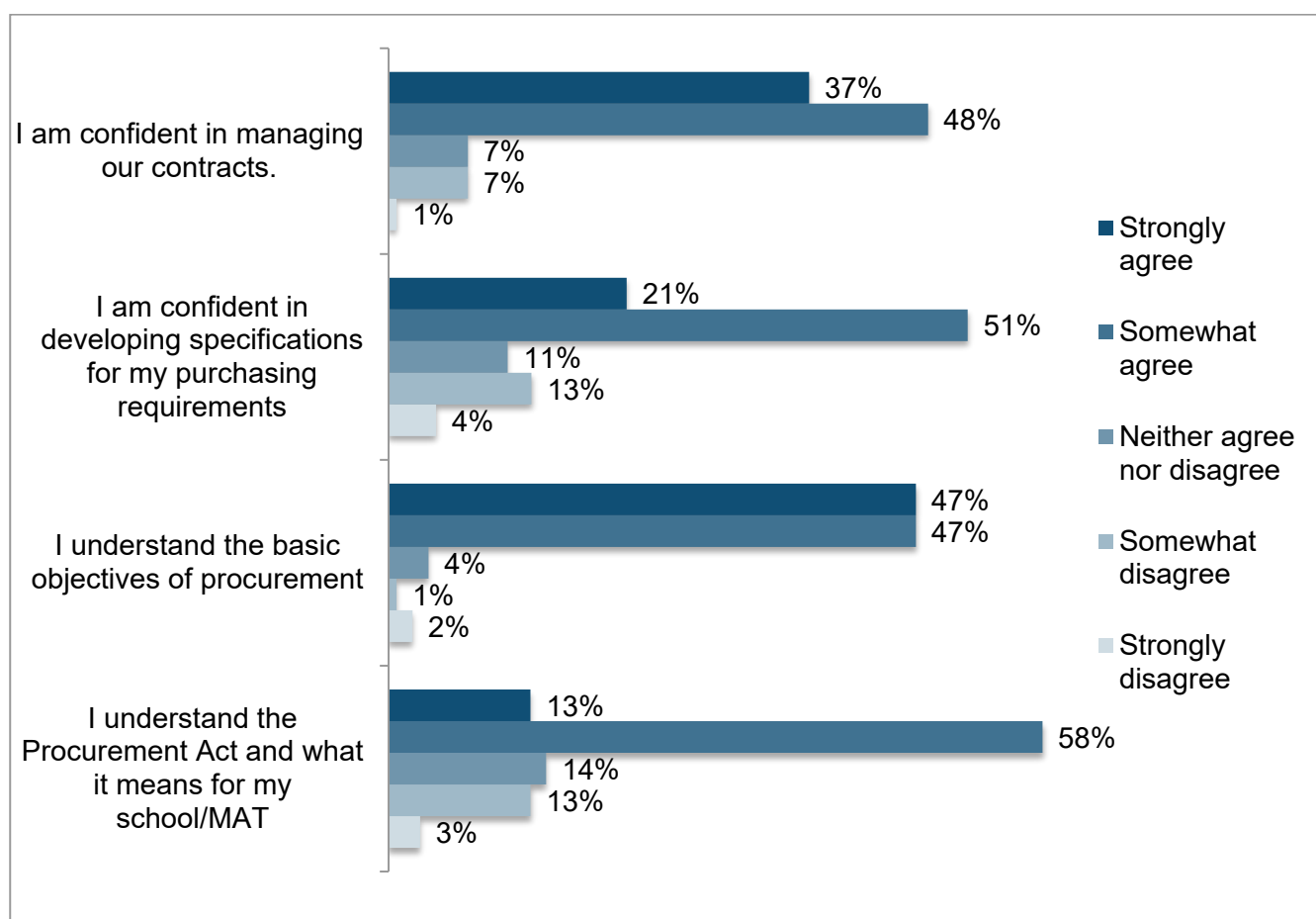
Figure 16: Agree / disagree with a series of statements on procurement – SBMs in primaries



Source: 'To what extent do you agree or disagree with the following statements about procurement?'
n=354 SBMs in primaries

We see a similar story for secondaries (Figure 17) as we do for SBMs in primaries with a similar foundation of self-reported confidence in their procurement ability, with similar views in terms of strength of confidence – compared to SBMs in primaries - in understanding of the Procurement Act to SBMs in primaries, confidence in managing their contracts, and developing specifications for purchasing requirements; somewhat agreeing in all three instances being the most frequently cited view. Seventeen percent (17%) disagreeing in their confidence to develop specifications may point to a skills gap and where additional support may be valued; the same with the Procurement Act (16% disagreeing that they understand it).

Figure 17: Agree / disagree with a series of statements on procurement – SBMs in secondaries



Source: 'To what extent do you agree or disagree with the following statements about procurement?'
n=143 SBMs in secondaries

Income generation (IG)

Many schools already generate their own income through activities such as letting part of their school estate in the evenings. Previous SBP surveys have not captured this activity, but we know IG often falls within the responsibilities of SBPs. The questions posed aim to better understand who is responsible for IG within schools and trusts, and what IG activities they find most valuable. Gaining insight into the barriers and levels of confidence with IG will help shape the department's view of how SBPs can best be supported in this part of their role.

Responsibility for income generation

Respondents were asked about the extent of responsibility for income generation. As with the question above, for more specificity in reporting, findings are shown by the main

respondent job roles. Broadly speaking, it's a story of shared responsibility, IG rarely being the responsibility of one person in a school or trust. The most senior SBP at a school or trust (i.e. a SBM or CFO or COO in a MAT) are most likely to have responsibility for income generation.

In terms of specifics, 39% of SBMs in primary schools were fully responsible, 52% partially responsible. For a SBM in a secondary, 45% were fully responsible, 45% partially responsible. And for a CFO or COO in a MAT, 26% were fully responsible, 57% partially responsible. As MATs are of varying size such findings are to be expected, likely with different delegations of responsibility between a MATs central team and academies within their trust.

At a school level (any phase), it is plausible that the responsibility is shared with the headteacher. Within MATs, responsibility may be shared with a central MAT team or delegated to academy level. Variation is likely, and reflective of how some MATs are more centralised than others.

Table 16: Responsibility for income generation

	SBM in primary	SBM in secondary	CFO and COO
Fully responsible	39%	46%	26%
Partially responsible	52%	45%	57%
Limited responsibility	8%	8%	11%
No direct responsibility	2%	2%	6%

Source: 'To what extent, if at all, are you responsible for income generation in your day-to-day role?' SBM primary n=356; SBM secondary n=143; CFO and COO n=115

Barriers to generating income

We know that the extent of income generation varies across schools, with some SBPs citing lack of knowledge, ideas or resource. We want to further develop our understanding of the reasons behind this including whether there are common barriers schools face. Respondents were asked about barriers they faced to generating income and could select more than one response, hence why percentages do not add up to 100% (Table 17).

A key takeaway is no variation in the main barriers when examined by phase of school: the top 5 reasons most commonly selected were the same for primaries and secondaries, with little variation in percentages. Resource allocation is the biggest barrier

as noted by the majority of primary SBMs (68%), secondary SBMs (75%) and CFOs and COOs (78%). Sixty-one percent (61%) of primary SBMs, 54% of secondary SBMs, and 50% of CFOs and COOs struggle to find additional funding sources. This indicates that further research may be needed to determine whether schools would benefit from support in this area.

Table 17: Barriers to income generation

	SBM in primary	SBM in secondary	CFO and COO
Allocating enough resource to income generation	68%	75%	78%
Difficulty in identifying additional funding streams, e.g., non-government grants	61%	54%	50%
The costs outweigh the benefits	44%	44%	48%
Lack of suitable facilities	39%	38%	38%
Uncertain what we are allowed to do	18%	14%	8%
Not supported by the responsible body	11%	9%	4%
Don't know	2%	3%	1%

Source: 'From the following list, please select up to three main barriers you face when trying to generate income for your school or trust' SBM in primary n= 348; SBM in secondary n=140; CFOs and COOs n=107

Confidence with income generation

It is worth noting that findings reflect respondent (only) confidence with the individual; they are not making a school or trust level assessment, other SBPs in their school or trust who may have some form of responsibility for income generation may have different degrees of confidence.

The majority of respondents fall into the "moderately confident" category: primary SBMs: 39%, secondary SBMs: 40%, CFOs and COOs: 52%. This alongside the "very confident" and "extremely confident" responses indicates a good level of understanding, but with room for growth. CFOs and COOs do, though, have higher confidence likely reflecting their greater experience and/or seniority of role; SBMs in primaries are the least confident.

Table 18: Confidence in income generation

	SBM in primary	SBM in secondary	CFO and COO
Not confident at all	10%	12%	5%
Slightly confident	32%	25%	21%
Moderately confident	39%	40%	52%
Very confident	16%	15%	18%
Extremely confident	3%	9%	5%

Source: 'From the following list, please select up to three main barriers you face when trying to generate income for your school or trust' SBM in primary n=350; SBM in secondary n=140; CFO and COO n=108

Income generation practices respondents felt added most value to their school or trust

All respondents were asked an open question: 'Which specific income generation practices led by yourself or others do you think have added the most value to your school or trust?'. Views ranged from one word responses to a few paragraphs.

For MATs, responses were mainly around hiring of facilities (temporary one-off payments) and letting the buildings and/or facilities (regular payment arrangements) being most frequently referenced. This would include lettings of halls or sports facilities to other private or 3rd sector organisations after the end of the school day, in school holidays, and at weekends. Next most common was obtaining grant or other external funding via bids, and a handful of references to investing money (likely their reserves) such as into high interest accounts. Having after-school clubs / wraparound provision in place was also a common response.

For primaries, the majority also highlighted the lettings of buildings and hiring of facilities as the principal income generation lever that they pull. Making grant applications and having wraparound care (managing it themselves) were also very prominent in responses, the second most frequently cited. The ability / benefit of being able to write good bids for funding also came through due to the value in applying for grants, another common theme. Like primaries and MATs, the majority of secondaries highlighted lettings and hiring out of their buildings, space or facilities. Also, like primaries and MATs, a number of secondaries see benefits in applying for grants, investing income somewhere, e.g., high interest accounts, and increasing the marketing of their school to increase admissions.

Suggestions for additional support from DfE on resource management

The final survey question asked: 'What more, if anything, would you like to see the Department for Education do to support you in managing school and/or trust resources?' This question was asked to inform policy thinking across the entire school business profession portfolio.

In addition to schools requesting additional funding other ideas suggested for DfE support included: the department having more targeted grants available, helping them in accessing different grant revenue streams, making possible grants (national and local) easier to find, having a database of regional charities and grant funders open to schools they could access, helping improve the visibility and professional recognition of the SBP role, increasing awareness of online training and support, promoting grant/funding opportunities more, e.g. in newsletters, and providing templates for contracts, policies etc that are user friendly to help schools safeguard resources and rewriting similar documents.

Conclusion

In keeping with how the report has been structured, this conclusion is best told in three parts reflecting the three main job roles of respondents as they made up the vast majority of respondents. With more detailed analysis of different types of SBP roles not possible, these concluding comments do not apply to all SBPs. We are considering how to further develop our understanding of the roles, responsibilities and support needed by the SBP roles less represented in this report.

There were some cross-cutting issues that emerged consistently across all three groups. All were experienced, most wished to stay in the profession, and demonstrated commitment to continued professional development. Additional recognition by senior leadership teams of the value school business professionals in general and SBMs can add, but isn't always utilised, came through frequently in the open text questions.

The barriers to income generation were consistent across schools and trusts: capacity for SBMs and CFOs / COOs to undertake it, identifying the right sources, and having the right facilities. And all groups could benefit from targeted guidance and/or training on the Procurement Act due to the gaps in confidence and understanding with it.

SBMs in primary schools:

SBMs in primary schools continue to operate as broad generalists, with relatively less experience than those in secondaries, but strong intent to stay in the profession, are less likely to be on the SLT (than those in secondaries) and by association less likely to be involved in strategic planning and workforce deployment. Some of this more limited strategic work may be the results of structural factors, a key one being, on average, smaller school size compared to secondaries, but also cultural ones, including the perceptions of the SBM role and the value it can bring to SLT strategic discussions. The confidence gaps around the Procurement Act, income generation and ICFP suggest a need for awareness and training, which they would prefer via accessible formats online.

SBMs in secondary schools:

SBMs in secondary schools are more likely (than those in primaries) to have operational leadership as their primary responsibility, are more experienced, more involved in strategic planning and workforce deployment, and more likely to be on the schools SLT. They are also more likely to use ICFP and the department's FBIT tool (56%) than those in primaries, which might suggest greater integration of DfE tools into strategic and financial planning, but also reflect their greater size. Their confidence in procurement and income generation is generally higher, though gaps remain in understanding the Procurement Act and in developing procurement specifications.

CFOs and COOs:

Given their senior positions, CFOs and COOs in MATs are the most experienced and strategically engaged group of the three, with the highest levels of confidence in income generation and procurement, likely reflecting the seniority and extent of experience required for such a role. However, their appetite to study for further formal qualifications is lower than SBMs, with a preference for on-the-job CPD (and which they prioritise more time for in year than SBMs). Despite the seniority of role, half citing difficulty identifying funding streams as a barrier to income generation.



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