



Discover the benefits of school business managers

Develop the bigger picture



This booklet explains how a school business manager can make a difference, and how they can help you to:

- free up your time to focus on the future
- get more out of your budget
- improve outcomes for children, and
- contribute to improving the working environment of your school.

Developing the school business manager role

The Training and Development Agency for Schools (TDA) and the National College for School Leadership (NCSL) work together, with their respective strategic responsibilities for the wider workforce and school leadership, to promote and develop the role of school business manager.

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1

The role of the school business manager

1.1 What is a school business manager?



A school business manager is a member of staff who helps to ensure the smooth and successful running of a school. By dealing with the leadership, managerial and administrative complexities that confront their schools, school business managers are supporting their headteachers and making a direct contribution to improving the effectiveness of their schools.

Areas of responsibility include strategic and operational management of finances, human resources, facilities, and sustainable development; line management and the professional development of support staff; and marketing and communications. They are most effective when they are appropriately trained and work in, or alongside, the school leadership team.

School staff who fulfil the role may have a number of job titles other than school business manager, including bursar, finance officer and senior administration officer.

Some school business managers work at both a strategic and an operational level in their school. This flexibility is particularly valuable in the primary sector,

and mirrors the nature of the primary headteacher role, which often requires a significant teaching commitment. Some highly skilled school business managers are now responsible for aspects of the strategic leadership of large and complex school organisations, including directing the work of other managerial and operational support staff and working across a number of schools.

There is no 'one size fits all' school business manager as each role is tailored to meet individual school needs. Many schools employ their own school business manager, but some smaller schools come together and share this useful resource for the benefit of all, as part of a distributed leadership structure.

1.2 The benefits of school business managers



Employing and developing school business managers can help to relieve the pressure on headteachers and the senior leadership team, while also using resources more effectively.

School business managers are playing an increasingly important role in 21st century schools by managing extended services and the relationships with professionals from a range of other agencies.

More time to focus on teaching and learning

Headteachers' roles and responsibilities cover strategic leadership and management as well as daily operations. We know that many headteachers want to increase the amount of time they spend on leading teaching and learning. It is a highly valued part of the job and the reason why many decide to become headteachers in the first place.

By employing a school business manager to take on or share other tasks and responsibilities, headteachers can dedicate more of their time to ensuring a high standard of teaching and learning. Recent NCSL research shows that effectively deployed school business managers, operating at the correct level, can save headteachers up to one third of their time.

Making the most of budgets and resources

Central to the case for recruiting a school business manager is the need to make best use of budgets and resources. School business managers not only make significant savings, they also identify new sources of funding.

They help put schools on a firmer footing by developing long-term financial plans. School business managers play a key role in linking strong financial management to the school improvement planning process. This is an essential element in achieving the Financial Management Standard in Schools (FMSiS), which is a requirement for all maintained schools. For more information please visit www.standards.dcsf.gov.uk/vfm



New and complementary skills

The challenges of running 21st century schools are many and complex. Headteachers need to build leadership teams with a wide range of professional skills – teaching and non-teaching.

Headteachers recognise the power of distributed leadership. Many also recognise the additional dimension that suitably skilled school business managers bring to their senior leadership teams. Consequently, the changing face of school leadership increasingly includes school business managers playing key roles.

Unlocking the potential of your whole school team

Developing people and nurturing talent is crucial to leadership in all organisations, and schools are no exception. One of the most important ways school leaders contribute to learning is through their impact on the motivation and development of their staff.

Most schools have seen a significant rise in the number and diversity of support staff in recent years. School business managers are well placed to take on the leadership, development and performance management of these staff.

More time for collaboration and implementing new initiatives

School business managers can make a vital contribution to the successful delivery of school improvement initiatives, which lead to better outcomes for pupils – for example, improvements in ICT and the learning environment.

They can also make an important contribution to developing integrated working through the extended services offered by schools. This includes developing and managing childcare facilities, after-school activities, parenting support, liaison with other agencies and specialist support services, and wider community access facilities, incorporating adult learning.

1.3 How the role of school business manager evolved



Since the introduction of local management of schools in the late 1980s, responsibility and accountability for finance, resources and facilities management has increasingly been devolved to schools.

This has meant a dramatic change in the nature and demands placed on headteachers, and has brought about the need for a greater range of professional skills in school leadership teams.

The NCSL and the TDA, with their respective strategic responsibilities for school leadership and the wider workforce, have together promoted and developed the role of school business manager. This has been done to provide school leadership teams with the range of professional skills they now need. Since 2002, over 6,000 school business managers have been trained, and the shape of school leadership teams has changed to embrace this role.

1.4 How school business managers can be deployed



Many headteachers have discovered that school business managers are now indispensable. However, some small schools may have difficulty employing a full-time school business manager, even though their needs and responsibilities may be similar to those of larger schools.

These schools may consider sharing the services of a school business manager with other schools in a number of ways, as described on pages 8–9.

A smaller proportion of primary schools currently have school business managers compared to secondary schools. The NCSL is working with the TDA and other key stakeholders to ensure that all primary schools have access to school business management skills in the future.

As part of the further development of the school business management programmes, the NCSL has set up a series of demonstration projects. These are taking place in schools – particularly in the primary phase. These demonstration projects are designed to determine the impact of school business management activities on teaching and learning. Each project will help to find out:

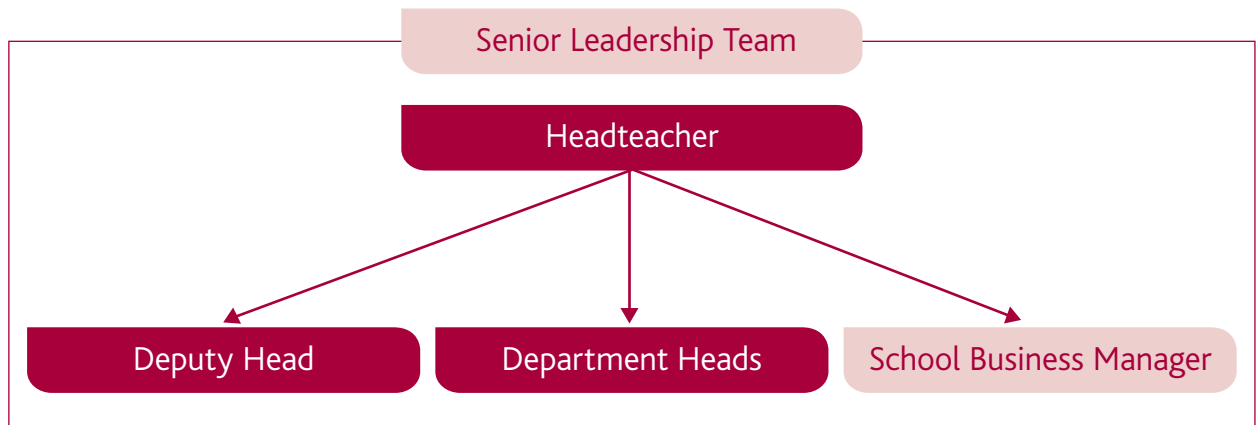
- which school business management roles are most effective in which contexts
- the skills and strategies headteachers need, to deploy school business managers effectively, and
- the training requirements for both internal and external school business manager candidates.

The NCSL will publish the findings through a series of case studies and a toolkit for headteachers, governors and local authorities. In addition, schools that might be considering recruiting a school business manager may find discussion with demonstration projects and case study schools helpful. Details of the locations of demonstration projects and case studies will be made available at www.ncsl.org.uk/sbmfuture

Models of deployment

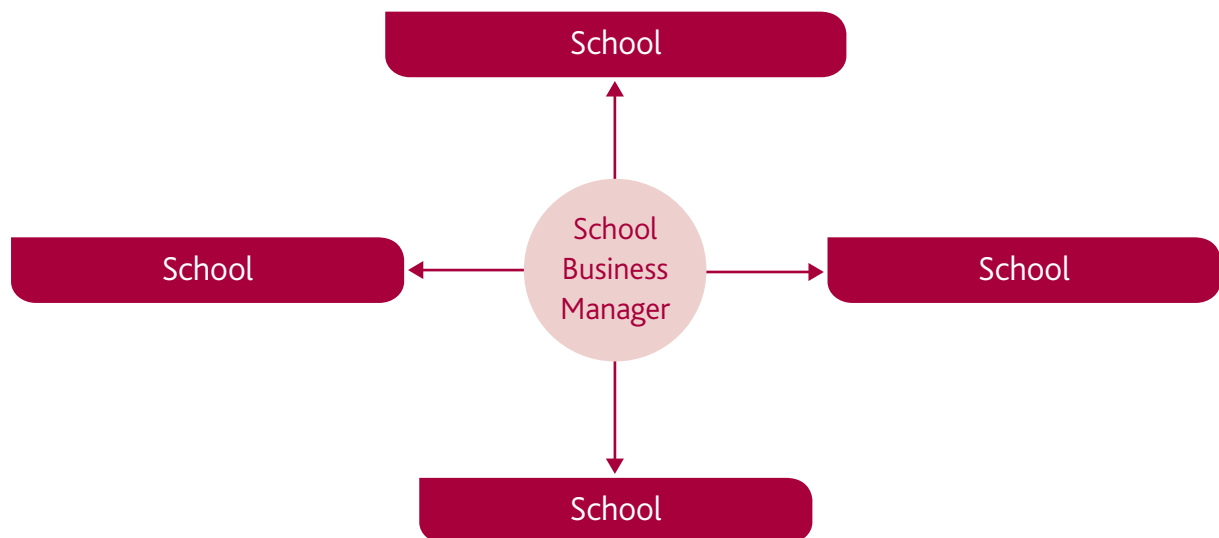
The following diagrams show different models of ways in which school business managers can be deployed.

Traditional school business manager structure



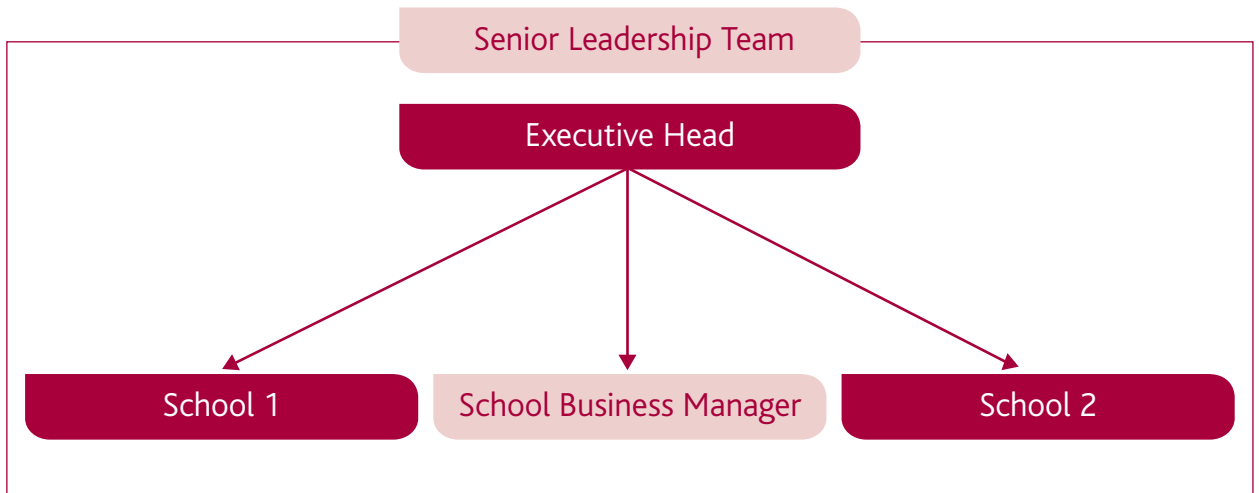
Example: Secondary schools and primary schools of approximately 250 pupils and above. Typical leadership structure with the school business manager as part of the senior leadership team.

Peripatetic school business manager



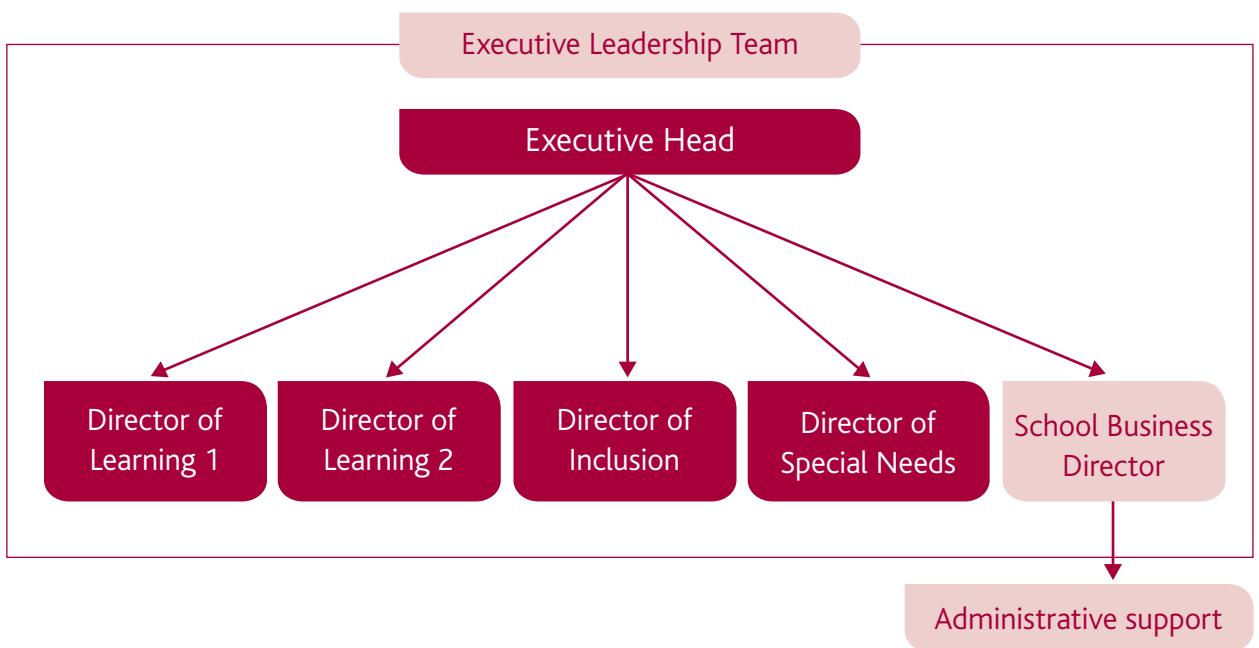
Example: Local authority or lead school providing school business management services to a number of small primary schools; or small primary schools who have their own cluster arrangements. This is an effective way for small schools to access school business manager support.

Federation – model one



Example: Federations of two or more schools; school business manager providing service to federation as a whole and working as a member of the senior leadership team of the federation.

Federation – model two



Example: Large formal federation which might include secondary, primary and special schools. The school business director is part of the 'executive' group and has dedicated support which might include additional finance, facilities or HR expertise.

Great Waltham Church of England Primary School



Diane Wilson, Headteacher

"When I came to Great Waltham four-and-a-half years ago, our school business manager, Margaret Richards, was already in post. Since then, her role has just got broader.

That means I can concentrate on my area of expertise – teaching and learning. Of course, the ultimate responsibility for the school lies with me and I need to be involved in the major decisions we make, but having someone else handle the day to

day running of things like premises, finance and personnel frees me up to do what I'm best at: ensuring that all our pupils and staff achieve their potential.

To date, Margaret's projects have yielded a fantastic school meals service and plans for a new outdoor classroom for our foundation stage children. And the great thing about having her in charge of projects like this is that not only do they get started, they get done.

For me, it seems entirely logical to make the school business manager part of your senior management team. The areas Margaret works in are essential to the running of the school.

Of course, having a school business manager means you have to be prepared to share your leadership. For me, it's been an entirely positive experience. I know the children in my school really well because I'm not stuck in my office."

David Moncaster, Chair of Governors

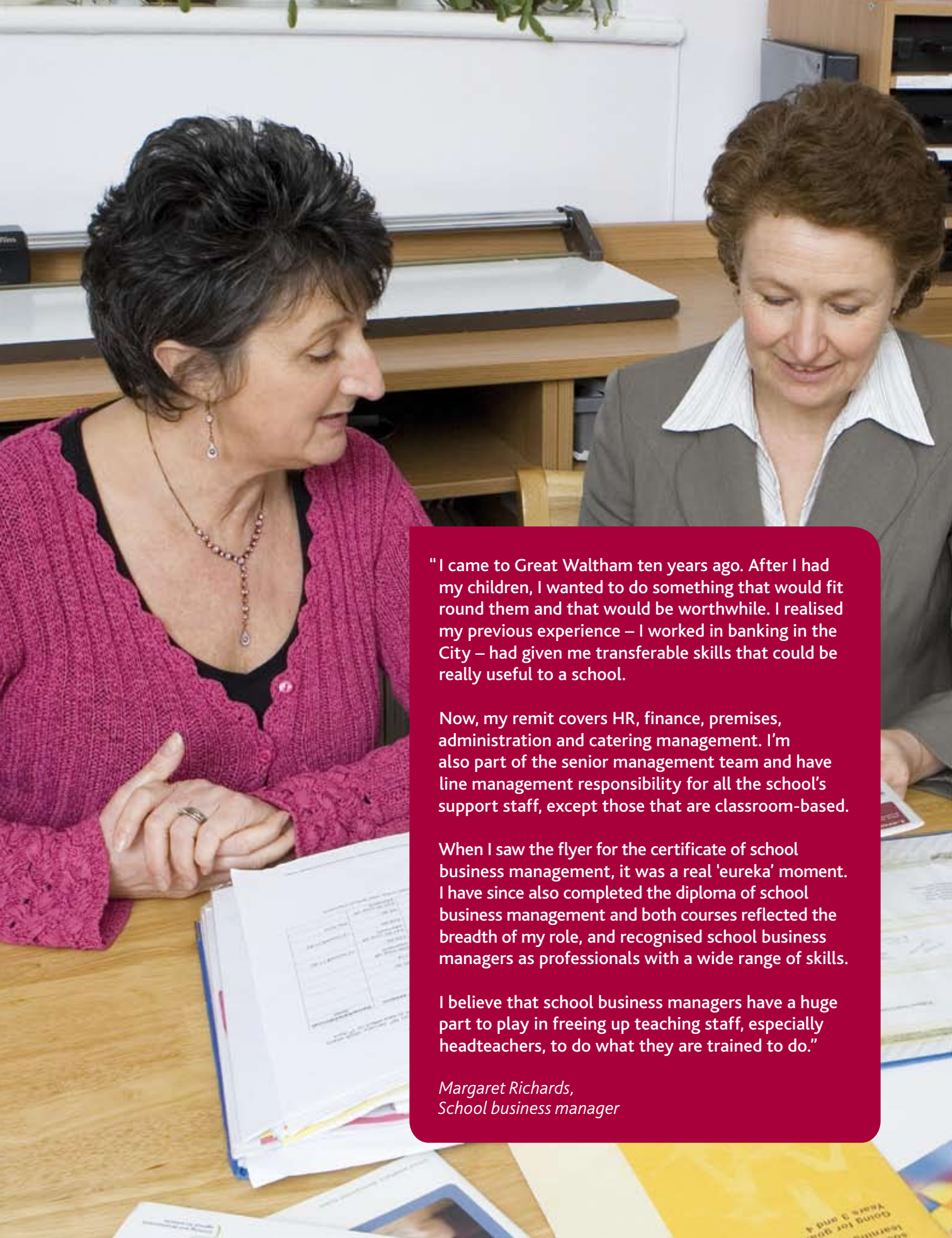
"Margaret Richards was already school secretary when I became a governor. Since then, her role has expanded almost beyond recognition. 'School business manager' is a much more accurate reflection of the breadth and importance of her role.

The governors supported Margaret through her Certificate and Diploma of School Business Management courses. We believe

it's important that her role is recognised, and the school as a whole stands to gain a lot from her increased knowledge and experience. Margaret is so much more confident now, both in herself and in dealing with other people. For example, she's excellent at negotiating with outside contractors.

The biggest benefit, though, is that the headteacher now has time to

focus on developing staff and raising standards. What we all want is for the school to continue to improve. For that to happen, the headteacher needs to be encouraging staff, observing them at work, and making sure they're getting the training they need. Because we've got such a strong school business manager, the headteacher has time to devote to those aspects of her job and that's reflected in our results."



"I came to Great Waltham ten years ago. After I had my children, I wanted to do something that would fit round them and that would be worthwhile. I realised my previous experience – I worked in banking in the City – had given me transferable skills that could be really useful to a school.

Now, my remit covers HR, finance, premises, administration and catering management. I'm also part of the senior management team and have line management responsibility for all the school's support staff, except those that are classroom-based.

When I saw the flyer for the certificate of school business management, it was a real 'eureka' moment. I have since also completed the diploma of school business management and both courses reflected the breadth of my role, and recognised school business managers as professionals with a wide range of skills.

I believe that school business managers have a huge part to play in freeing up teaching staff, especially headteachers, to do what they are trained to do."

*Margaret Richards,
School business manager*

1.5 Frequently asked questions



Are school business managers worth the investment?

Absolutely! Developing or employing a school business manager needn't be a financial burden, and a school could quickly reap the rewards.

- By identifying savings and additional funding, they could help the average primary school increase their budget by £18,000 and the average secondary school by £56,000
- Research has also shown that on average, school business managers can cover their salary costs over a three-year period
- School business managers can also ensure that schools use local authority finance and human resources services to maximum effect. This is especially true of school business managers who have experience of working for local authorities.

Shouldn't a headteacher be able to cope without one?

The challenges facing schools in the 21st century for improving the life chances of children and young people are wide and varied. They include the expansion and development of the school's role in the local community and managing extended services.

Taking on a school business manager is a sensible alternative to headteachers trying to do everything themselves. They will give headteachers more time for leading teaching and learning.

The Department for Children, Schools and Families (DCSF), governors and local authorities also want to free up headteachers' time to improve their work-life balance.

A school business manager is there to provide leadership and management support where it is most needed.



Can they play a central role without qualified teacher status?

School business managers can be effective strategic leaders and members of the school leadership team. Teachers and headteachers will know the 'ins and outs' of life in the classroom, and the related priorities and strategies which need to be focused on. However school business managers can provide the expertise on the resource management elements of running a successful school.

Additionally, the fact that most school business managers come from a non-teaching background can bring them a fresh perspective that makes them an excellent sounding board for new approaches.

What is the role of the local authority?

Local authorities help to develop local frameworks that assist schools in developing, recruiting and retaining a skilled and committed workforce. They are ideally placed to provide schools with guidance on development programmes and training opportunities. They are also becoming increasingly involved in promoting school business management training delivered by the NCSL.

Some local authorities provide full school business management services. As these school business managers work in a number of schools, there is an opportunity to share best practice and sound working alternatives to improve decision-making processes. Other local authorities provide financial and management support services that schools can buy.

However, these do not necessarily provide the strategic leadership skills that a trained school business manager can bring. As with any bought-in service, schools that are considering this route should examine the services on offer thoroughly to ensure they meet the needs of their school.

2

How to develop
or recruit a school
business manager

2.1 Where to look for a school business manager



For schools considering recruiting a school business manager, there are two main routes:

- developing the skills of an existing member of the school staff through the certificate, diploma, or advanced diploma of school business management – this is how most schools find their school business manager, or
- recruiting somebody externally and training them to be effective in your school environment.

This section considers each approach in more detail.

2.2 Developing an existing staff member



“ My diploma ended up having an enormous impact on my school. I planned and implemented a large-scale building project that led to the total reorganisation and refurbishment of the science department.

I managed to secure £800,000 in funding from a wide range of sources.”

*Michael Francis,
School business manager,
Joseph Rowntree School,
York*

The TDA and the NCSL work together to deliver the certificate of school business management (CSBM), diploma of school business management (DSBM) and advanced diploma of school business management (ADSBM). These courses are ideal because they have been designed to provide candidates with the essential skills and competencies that will enable them to operate effectively in their school as school business managers.

From the experience and evidence of the trainees who have completed the training, it is highly likely that there is already somebody working in your school who has the desire and potential to play a more significant leadership role by undertaking these development programmes.

The NCSL plans to introduce a further programme, the School Business Director (SBD) Programme, to reflect the changing organisational structures of schools and settings.

2.3 Training for school business managers



Certificate of School Business Management

This course is aimed at practising school business managers, including recent appointees and those in school administrative and support roles. It is also suitable for new entrants to the school management profession.

The course covers a range of competencies and knowledge areas including:

- facilities management
- risk management
- human resource management
- financial management
- office systems management
- ICT management, and
- sustainable development.

Diploma of School Business Management

This course is aimed both at experienced school business managers in schools, and at managers from outside the education field who are looking to work in a school. Candidates from schools should either be members of their school senior leadership team, or working closely with them.

The course focuses on the role the school business manager can play in determining the strategic direction of the school. The range of competencies and knowledge areas covered include:

- strategic management
- managing school improvement, and
- change management.

Both of these courses are externally accredited by the Institute of Administrative Management. For more information about the courses please visit the NCSL website www.ncsl.org.uk/sbm

Advanced Diploma of School Business Management and School Business Director programmes

The NCSL is working with the TDA and other stakeholders to develop higher-level training, qualifications and career pathways, in response to the demand for higher-level school business manager skills. The ADSBM course and the School Business Director Programme are now being developed to build on the foundation of the CSBM and DSBM courses.

The content of the School Business Director Programme has yet to be finalised, but will be set at masters level. However, more information covering both of these programmes will be made available at www.ncsl.org.uk/sbmfuture

When all these courses are in place, the NCSL will be able to offer programmes to schools, school business managers and external candidates, from the national qualifications framework (NQF) level 4 (CSBM) through to masters level – the School Business Director Programme.

All Saints RC School, York



Bill Scriven, Headteacher

“For me as headteacher, having a school business manager is about getting things done better. In Sharon, I have a professional who is trained and experienced in running the business side of the school, and motivated to do it well. It’s very different from having to ask a member of the teaching staff to find the time on top of their other duties.

Before Sharon started here I spent a great deal of my time on non-teaching issues. It was diverting my attention from my core purpose as headteacher –

engaging teachers and pupils in teaching and learning. Having a specialist school business manager makes my job more enjoyable and saves me hours of time and worry.

Ours is a large school, with 1,200 pupils, and so we have a full-time school business manager. But if I were working in a small school I would still make sure I at least had access to a shared school business manager – they are just so valuable.”



"I would say that the essence of my job is doing the best that I can to support learning in the school. It means watching budgets closely, getting best value, managing projects – small and large – and maintaining good, productive relationships with contractors, whether they're supplying a new photocopier or a new building.

As the only non-teacher on the senior leadership team, I come at things from a different angle. And because of my training – I've done both the CSBM and DSBM courses – I often have more depth of knowledge than anyone else about certain areas. That's my contribution to the running of the school: business advice and expertise."

*Sharon Lang,
School business manager*

2.4 Recruiting your school business manager externally



“I spent most of my career in the construction industry in administration, before becoming a school business manager.

Schools today offer a challenging and exciting working environment. I feel that the Diploma – and the MBA – are helping to equip me to meet these challenges, now and in the future.”

*Jane Onn,
Freelance school
business manager*

Recruitment advertisements for school business managers are now commonplace in the media. Recruiting highly skilled individuals from other professions helps schools bring a business dimension into the relevant aspects of the decision-making process, strengthening them in areas including strategic planning, finance and facilities management, HR and procurement.

There is also a jobs website specifically for school business managers and other senior school management and administrative posts. If you are considering advertising for a school business manager, or know somebody who wants to take up a position as one, you will find the information you need at www.sbmjobs.co.uk

School business managers recruited from outside the education sector may be entitled to access the NCSL's school business management courses, or modules that are appropriate to their specific needs. Further details can be found at www.ncsl.org.uk/sbm

2.5 Employing a school business manager – core and variable functions, skills and competencies



Before employing a school business manager you will want to work out how they can best contribute to your school. The job description will then simply need to list the functions you wish them to undertake.

The job profile laid out across pages 22–30 has a modular design so that you can adapt it to meet your own school's requirements. We have also linked the different aspects of the profile to the CSBM or DSBM courses.

Clearly, the job specification will vary depending on your school's needs. It is up to you and your school to decide exactly what is required, using the job profile and table on page 32 as a guide.

The content of the job profile and the school business manager skills and competencies table which follow are simply advisory – they should not be seen as restrictive, as other tasks specific to your school could be added.

However, if school business managers are to give full and effective strategic support to headteachers, they cannot be expected to carry out all the management and administration aspects of the profile as well. Therefore, no one person should be expected to take responsibility for all the duties outlined without adequate administrative support.

Working collaboratively with the TDA and the NCSL, the National Association of School Business Management (NASBM) will shortly publish a comprehensive competency framework on which they have consulted widely with national stakeholders and school business managers.

Table one describes the core strategic functions that every school business manager should fulfil. Tables two–six describe the functions that will vary according to the individual school's needs. The functions are not listed in order of importance, but have been numbered for easy reference.

Core functions for every school business manager

1 Strategic leadership and management	Relevant training and development courses
Resources	
<ul style="list-style-type: none"> 1.1 Ensure the school makes the best possible use of resources through effective planning, considering all financial and other resource implications. 1.2 Produce timely and fully costed proposals, ensuring they are sustainable through long-term (five-year) financial plans. 1.3 Ensure an effective link between the school financial plan and the school improvement plan – necessary to achieving the Financial Management Standard in Schools (FMSiS) and sustainable school improvement. 1.4 Understand the implications of government policies and educational trends and developments. 1.5 Plan for and implement new initiatives. 	<p>CSBM DSBM</p>
Management	
<ul style="list-style-type: none"> 1.6 Provide strategic support to the headteacher and governing body on all aspects of school business management. 1.7 Manage the disciplines of finance, human resources, ICT, estate management, whole-school administration and marketing as required. 1.8 Lead in the training and development of the increasing number and diversity of support staff in schools. 1.9 Ensure teaching and support staff work effectively together. 	<p>CSBM DSBM</p>

Management *continued...*

1.10 Take an active role in coordinating and managing the relationship of the interested parties and agencies involved in delivering effective extended school services. These include children, parents, school staff, the LA, the voluntary sector and national/regional organisations such as the police and health service.

CSBM
DSBM

Risk management

1.11 Ensure effective risk management, for example, in health and safety and in the management of any third-party service contracts.

1.12 Develop a detailed disaster recovery plan.

1.13 Negotiate, manage and monitor contracts, tenders and agreements ensuring 'best value' at all times.

1.14 Manage all aspects of school business management in a sustainable and eco-friendly manner.

CSBM
DSBM

Variable functions according to a school's needs

2 Finance and managing resources

Relevant training
and development

Resource management

2.1 Prepare the annual estimates of income and expenditure for approval by the headteacher and governors.

2.2 Obtain agreement of budgets and monitor them against accounts.

2.3 Prepare regular management accounts for budget holders and report on the financial state of the school to the governors.

CSBM

DSBM

2.4 Advise the headteacher and governors on investment and financial policy, preparing appraisals for particular projects and developing a long-term business plan or financial strategy for the future development of the school.

Variable functions according to a school's needs

continued...

Resource management *continued...*

2.5	Ensure the school complies with FMSiS.	CSBM
2.6	Use financial management information, especially benchmarking tools, to analyse trends and identify opportunities for greater efficiency.	DSBM
2.7	Manage the school accounting function effectively to agreed procedures, and maintain those procedures by conducting at least an annual review.	CSBM
2.8	Monitor all accounting procedures and resolve any problems, including: <ul style="list-style-type: none">– ordering, processing and payment for all goods and services provided to the school– operation of all bank accounts, ensuring that a full reconciliation is undertaken at least once per month, and– maintaining an assets register, and preparation of invoices and collection of fees and other dues, taking legal action where necessary to recover bad debts.	
2.9	Prepare the final accounts and liaise with the auditors.	
2.10	Provide detailed management accounts for the governors and headteacher according to an agreed schedule, reporting immediately any exceptional problems.	
2.11	Provide a comprehensive payroll service for all school staff, including operation of the various pension schemes and other deductions in which the school participates.	
2.12	Prepare all financial returns for the DCSF, LA and other central and local government agencies within statutory deadlines.	
2.13	Deal with the school's rating assessment and VAT liabilities, and advise on the financial implications of charitable status with respect to the current and any future tax legislation.	

Resource management *continued...*

2.14 Maximise income generation within the ethos of the school.	CSBM
2.15 Ensure best value principals are adopted, for example, in extended schools activities.	DSBM
<hr/>	
2.16 Act as point of contact with central and other agencies with regard to grant applications, gifts and other donations.	CSBM

Bids and contracts

2.17 Secure bid-based competitive funds by effective use of bidding systems and contacts.	CSBM
2.18 Negotiate, manage and monitor contracts, tenders and agreements for the provision of support services.	
2.19 Purchase, either directly or indirectly, the school's energy supplies.	
2.20 Arrange school facilities to include: <ul style="list-style-type: none">– catering– transport, including minibus(es) and drivers– school shop, and– bookings for school facilities, and provision of facilities for additional tuition out of school hours, including music.	
2.21 Seek professional advice on insurance and advise the governors on the appropriate insurances for the school.	
2.22 Implement the approved insurances, and handle any claims	

Developing sponsorship links

2.23 Secure sponsorship funding using commercial flair.	DSBM
2.24 Act as an articulate ambassador to develop contacts and raise the school profile.	

Variable functions according to a school's needs *continued...*

3 Human resources	Relevant training and development courses
Personnel issues, support staff management and development	
<p>3.1 Take responsibility for general personnel matters including employment clearance for new staff (medical checks, child protection) and issuing contracts of employment.</p> <p>3.2 Advise governors on the assessment of salaries, expenses, sickness and maternity procedures, redundancy and other matters of dismissal.</p> <p>3.3 Attend employment tribunals as necessary.</p> <p>3.4 Maintain confidential staff records and ensure that staff records held in the school by others are kept confidential.</p>	CSBM
<p>3.5 Provide leadership and guidance for support staff, including direct line management responsibility where appropriate – administrative and clerical, financial, technicians, medical, welfare and teaching assistants, premises and maintenance, ground staff, cleaners and caterers.</p>	DSBM
<p>3.6 Manage the recruitment, professional development, appraisal and training of all support staff.</p>	CSBM
<p>3.7 Plan for, arrange and report on staff development aspects for all staff.</p>	DSBM
Contracts administration – managing employment contracts	
<p>3.8 Oversee all staff contracts and coordinate the administration of staff recruitment.</p>	CSBM

Advising on employment law

- 3.9 Advise governors on the policy needed to comply with legislation in areas such as employment protection, equal pay, sex discrimination and the implementation of these policies in school.
- 3.10 Formulate, monitor and implement the school's safety policy to comply with the requirements of the Health and Safety at Work Act and other legislation.

DSBM

- 3.11 Act as the school's health and safety coordinator and fire officer.

CSBM

4 Estate management

Relevant training and development

Premises and health and safety management

- 4.1 Manage the maintenance of the school site and buildings, the preparation of maintenance schedules and the efficient operation of all facilities on the property.
- 4.2 Oversee the supply of lighting, heating, domestic hot water, cooking, ventilation, water softening, energy conservation, etc.
- 4.3 In cooperation with the fire service, to manage the installation and maintenance of equipment for protection against, and escape from, fire.
- 4.4 Initiate and keep records of regular fire practices and alarm tests.
- 4.5 Ensure emergency procedures are current and timely.
- 4.6 Manage the security of the school site.
- 4.7 Manage the upkeep of playing fields, gardens, all-weather surfaces, tennis courts and land drainage.
- 4.8 Ensure the maintenance of boundaries, footpaths, roads and rights of way.
- 4.9 Purchase, repair and maintain all furniture and fittings.

CSBM

Variable functions according to a school's needs *continued...*

Premises and health and safety management *continued...*

- | | |
|---|------|
| 4.10 Know about health and safety regulations, particularly the main issues specific to the school and how they relate to students, staff, visitors, contractors and other users of school premises and facilities. | CSBM |
| 4.11 Know the elements of fire safety and the associated risks to the school through the process of risk assessment. | |

Letting and risk assessment

- | | |
|---|--------------|
| 4.12 Manage the letting of the school premises to outside organisations and school staff, and the development of extended schools activities, with particular reference to the local community. | CSBM
DSBM |
| 4.13 Acquire and dispose of land and buildings as authorised by the headteacher and governing body. | CSBM |
| 4.14 Draw up outline specifications for new buildings, obtaining tenders, obtaining planning permission, and liaising with building contractors and the school architect. | |
| 4.15 Know about risk assessment tools and how to use them to establish hazards within the school and the associated risk involved. | |
| 4.16 Be aware of the importance of a disaster recovery plan and its place within the management procedures of the school. | |

Loss prevention strategies

- | | |
|---|------|
| 4.17 Know the elements of a comprehensive disaster and recovery plan and to action the plan responsibly if necessary. | CSBM |
| 4.18 Implement risk management and loss prevention strategies to reduce insurance costs. | DSBM |

5 Whole school administration	Relevant training and development
ICT management	
5.1 Manage the administrative function including the administrative ICT facilities, school reception, reprographics, records and telephones.	CSBM
5.2 Manage the school's administrative and financial computer network systems. 5.3 Oversee the implementation of appropriate information management systems; and the full computerisation of the administration accounting and record system. 5.4 Act as system manager for the administrative computer network and curriculum network if appropriate.	CSBM DSBM
5.5 Provide for the preparation and production of all school records and publications. 5.6 Maintain pupil records including those for the assessment process. 5.7 Analyse the data and, in conjunction with teaching colleagues, to form strategies to address specific issues. 5.8 Act as correspondent for the DCSF and be responsible for the records and returns required. 5.9 Obtain the necessary licenses and permissions, and ensure their relevance and timeliness.	CSBM
Admissions	
5.10 Advise the headteacher and governors on the need for an admissions and appeals policy; and develop a school admissions and appeals policy.	DSBM

Variable functions according to a school's needs *continued...*

Relationship management

5.11 Act as a bridge to facilitate closer working relationships between teaching and support staff; and develop school policies for working with contractors and outside agencies.

DSBM

6 Marketing and liaison

Relevant training and development

Promoting the school

6.1 Promote the school to different audiences and raise the profile within the local community.

DSBM

Links to other schools and agencies

6.2 Ensure effective liaison with other schools. For example by linking to a learning network and accessing training on a group basis to reduce costs and/or improve accessibility.

DSBM

6.3 Ensure effective liaison with all interested parties and agencies involved in delivering successful extended school services.

Business community links

6.4 Liaise with local businesses for fundraising, arranging vocational experience and joint projects.

DSBM



The table on page 32 sets out the skills and competencies mapped against the various potential school business manager levels. Those working at the advanced school business manager and school business director levels would be responsible for whole areas of the strategic leadership of large and complex school organisations.

The CSBM and DSBM programmes cover a few of the advanced school business manager and the school business director skills and competencies in the table on page 32.

The ADSBM and planned School Business Director Programme will focus on these higher skills and competencies. For further information, please visit www.ncsl.org.uk/sbmfuture

School business managers – skills and competencies

	Entry level	Intermediate	Advanced	Director
Finance	<ul style="list-style-type: none"> • Order processing • Purchasing • Cash / banking 	<ul style="list-style-type: none"> • Prepare budget • Prepare reports for governors and LA • Track performance to budget 	<ul style="list-style-type: none"> • Fundraising and grant-writing • 3 year budgeting • Provide advice on optimising spending • Ensure standards and compliance 	<ul style="list-style-type: none"> • Lead multi-year financial planning • Redesign financial systems • Negotiate major business partnerships
People	<ul style="list-style-type: none"> • Administer contracts • Manage payroll • Maintain staff records 	<ul style="list-style-type: none"> • Manage some support staff • Liaise with LA when HR queries arise 	<ul style="list-style-type: none"> • Manage supportstaff • Administer performance management processes for all staff • Provide expertise on legal issues 	<ul style="list-style-type: none"> • Reconfiguration/ optimisation of staffing (across network) • Design performance management systems • Dispute resolution • Talent management strategies
Operations	<ul style="list-style-type: none"> • Office management • Maintain pupil records • Secretarial duties • Site management 	<ul style="list-style-type: none"> • Premises management • Manage contracted-in services / SLAs • Insurance • Update policies 	<ul style="list-style-type: none"> • H&S, fire and risk management • Manage capital projects • Manage ICT / MIS systems • School marketing • Develop policies 	<ul style="list-style-type: none"> • IT-enablement • Large-scale project management (eg BSF; site reconfiguration)
Extended schools/ pastoral		<ul style="list-style-type: none"> • Lettings • Before and after school clubs • Lunchtime management 	<ul style="list-style-type: none"> • External agency relationship management • Manage extended services provision • Liaise with parents on non-T&L 	<ul style="list-style-type: none"> • Set-up and develop very broad service lines • Manage multi-agency relationships
Networks & partnerships		<ul style="list-style-type: none"> • Part of bursar networks to share best practices 	<ul style="list-style-type: none"> • Main liaison with other schools on non-T&L matters • Shared services 	<ul style="list-style-type: none"> • Help realise federations • Explore / promote federations

2.6 Interview arrangements and salaries



The school business manager jobs website at www.sbmjobs.co.uk and the National Association of School Business Management (NASBM) can provide support and advice to schools on interviewing arrangements for school business managers.

The school, particularly the headteacher and governing body, will need to agree a salary which will attract the calibre of school business manager they require. Their local authority can give advice on appropriate salary levels. Similarly, the school business manager jobs website and the NASBM can provide information on salaries.

A new national negotiating body – the School Support Staff Negotiating Body (SSSNB) – is being established to develop and put plans into place to implement a nationally consistent pay and conditions framework for those support staff employed in maintained schools in England. Further information on the SSSNB can be found on the DCSF website at www.dcsf.gov.uk

Fishergate
Community
Primary School,
York

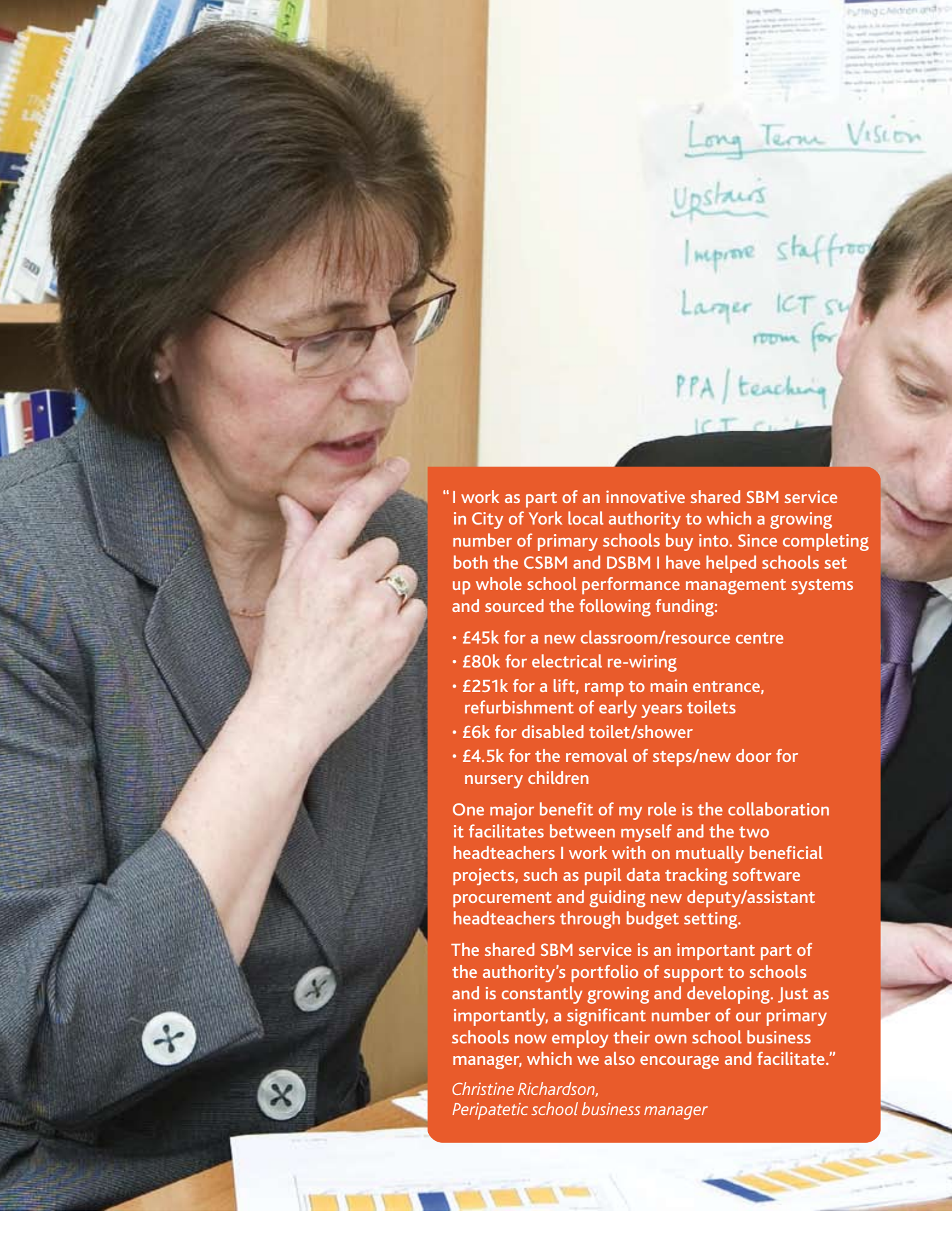


Andy Herbert, Headteacher

“Chris Richardson joined us as a school business manager four years ago. She is employed by the local authority and is part of a shared school business manager service, which we buy into.

Chris has developed her role to make it much more strategic. I have found that having a school business manager has actually meant a net saving in cost, because of the cost-saving and efficiency work she is doing.

Chris is a member of our senior leadership team, and the fresh perspective she brings is invaluable. For example, she looks after procurement, which requires skills that aren't about teaching. She also manages our service contracts such as food and cleaning, which I used to have to do myself. Chris acts almost as my deputy on employment and payroll issues. She's everyone's first port of call when something needs sorting out, which is great because she can get to problems much quicker than I could.”



"I work as part of an innovative shared SBM service in City of York local authority to which a growing number of primary schools buy into. Since completing both the CSBM and DSBM I have helped schools set up whole school performance management systems and sourced the following funding:

- £45k for a new classroom/resource centre
- £80k for electrical re-wiring
- £251k for a lift, ramp to main entrance, refurbishment of early years toilets
- £6k for disabled toilet/shower
- £4.5k for the removal of steps/new door for nursery children

One major benefit of my role is the collaboration it facilitates between myself and the two headteachers I work with on mutually beneficial projects, such as pupil data tracking software procurement and guiding new deputy/assistant headteachers through budget setting.

The shared SBM service is an important part of the authority's portfolio of support to schools and is constantly growing and developing. Just as importantly, a significant number of our primary schools now employ their own school business manager, which we also encourage and facilitate."

*Christine Richardson,
Peripatetic school business manager*

The Training and Development Agency for Schools

The TDA is committed to promoting the well-being and educational achievement of all children in everything that we do. We work with schools to develop the skills of the whole school workforce. We create standards and development opportunities for all staff, to ensure that schools can recruit good quality, well-trained people who will continue to develop and improve their skills to support children's learning. We work to ensure that the supply and quality of teacher training meets demand, and promote teaching as a career. We support the modernisation of the school workforce to help schools access the resources they need to remodel their workforce, deploy staff effectively and introduce extended services.

www.tda.gov.uk

The National College for School Leadership

The National College for School Leadership (NCSL) helps make a positive difference to children's lives through the development of world-class school and children's centre leaders. We provide a range of leadership development activities, publications and resources to suit the needs of leaders at different stages in their careers and in a wide range of contexts. We also work with schools and others to identify and grow future leaders and develop leadership within and beyond schools by enabling excellent leaders to share expertise.

The NCSL is changing

In September, the National College for School Leadership is changing its name. The new name reflects the recent extension of our remit to offer development opportunities for leaders of children's services. It encapsulates a common commitment to improving the lives and life chances of children and young people. We will continue to maintain our unrivalled services and programmes for school and children's centre leaders. For more information visit

www.ncsl.org.uk/changing

Find out more

For information on school business managers visit:

www.tda.gov.uk/leaders/supportstaff/bursars

www.ncsl.org.uk/bdp

For all other information on support staff training and development please visit:

www.tda.gov.uk/developsupport

The TDA is committed to providing accessible information. To request this item in another language or format, contact **TDA corporate communications** at the address below or e-mail: corporatecomms@tda.gov.uk

Please tell us what you require and we will consider with you how to meet your needs.

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