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# 4

## Section 4 **CSBM findings**



## 4.1 Introduction

This chapter presents the principal findings from our CSBM evaluation. There are five sections to this chapter:

1. Rationale for the CSBM course
2. CSBM aims and objectives
3. CSBM evaluation approach
4. Data presentation and analysis
5. CSBM candidate interviews

## 4.2 Rationale for the CSBM course

In 2001, responding to the request by the then Secretary of State for Education and Skills to train 1,000 SBMs by 2006 and to help establish a profession of school business management, NCSL and its partners began developing an entry-level qualification for school SBMs.

The rationale for an entry-level qualification was that, with ever-growing administrative demands on maintained schools, a course was needed to train and empower the school SBM workforce. Most SBMs and potential SBMs were to be found in primary schools. This course aimed to provide basic training in the areas of competence needed to discharge the responsibilities of school administration, finance and compliance effectively.

The CSBM course currently provides eight modules covering the fundamental aspects of school business practice (item 8, the environment module, was added later):

1. School business management
2. Facilities management
3. Risk management
4. Financial management
5. Office systems management
6. ICT management
7. Human resource management
8. Environmental management (sustainable development)

The rationale for this course was that it would release school governors and headteachers to focus on teaching and curriculum development. Holders of the CSBM, validated by the Institute of Administrative Management, are recognised as appropriately trained and so certified as competent to practise.

### 4.3 CSBM aims and objectives

The CSBM aims, as stated in the *Candidate Programme Guide* (NCSL, undated), are to provide:

- an opportunity to enhance the leadership, administration and managerial capacity of candidates in an educational setting
- a framework to facilitate the acquisition of knowledge, understanding, skills and experience; this, in turn, will enhance candidates' ability to understand and contribute to the effectiveness of their own schools
- a programme framework within which each candidate may negotiate tasks and areas of experience to suit their own individual needs and development where appropriate
- a range of established techniques to enable candidates to initiate and undertake critical analysis of information, proposing solutions to problems arising from that analysis
- an opportunity for candidates to effectively communicate information, arguments and analysis in a variety of forms, to specialist and non-specialist audiences, and deploy key techniques of school business management effectively
- the opportunity to engage in reflective debate and practice
- a foundation for future advanced professional development in the profession of school business management

The course is delivered to groups of candidates by means of three, two-day residential sessions, each group with a pair of tutors in a ratio of around 1 tutor per 10 candidates. Through meeting and learning in this way, SBMs have an opportunity to develop networks, to share ideas and good practice and to provide mutual support.

A substantial online learning element was built into the design of the course. This is used to provide material for candidates, provide a secure link with their tutors and enable them to share problems and issues with their colleagues nationally. This is part of an approach described as 'blended learning'.

### 4.4 CSBM evaluation approach

A pilot CSBM course set up in 2002 has been evaluated by the University of Manchester (University of Manchester, 2003). As a result of that evaluation many early problems and issues were identified and dealt with by NCSL and its contractors. When we were appointed in the autumn of 2003, the CSBM course had already been rolled out nationally and was being delivered by two contractors, Serco Education and Children's Services (Serco) and Manchester Metropolitan University.

The aims behind our approach to CSBM evaluation were to:

- examine the extent to which the CSBM course has met its organisational objectives, and impacted upon and met the needs of its participants
- assess the engagement by participants with various aspects of the course
- identify which interventions or practices were most beneficial in securing the desired course outcomes
- describe how CSBM outcomes are being applied in schools
- create indicators enabling course leaders to measure development of trainee SBMs' attitudes, knowledge and awareness during the course
- investigate the extent to which course outputs have lasting impacts on individual SBMs
- investigate how course outputs are perceived to have wider impacts in schools
- develop new indicators and instruments in the light of the above

To achieve these objectives, we developed the strategies and instruments described in chapter 3. In the following sections evaluation data is presented in a broadly chronological manner: demographic data on candidates; data on the residential sessions; early satisfaction survey data on these sessions; and finally data on course impacts, particularly from interviews with SBMs and some of their headteachers.

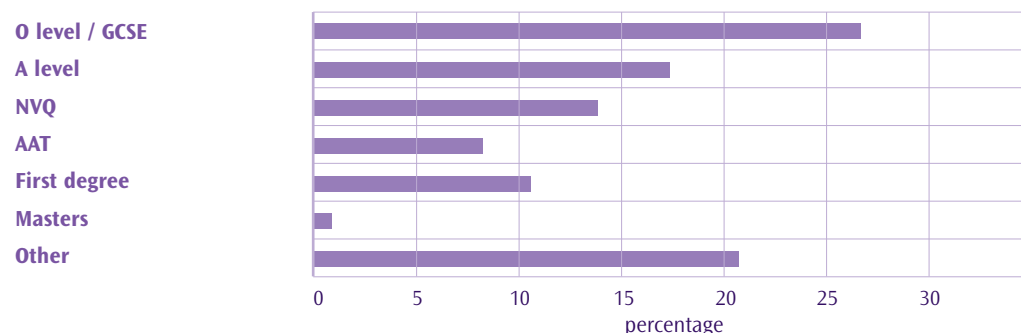
## 4.5 Data and analysis

### 4.5.1 CSBM candidate data

This section sets out overall data about CSBM completions, and some basic demographic data about candidates. Information in table 4.1 and figure 4.1 is from the NCSL database.

**Table 4.1: CSBM cohort composition**

| Start date | Cohort number | Number of candidates | Male | Female | Primary | Middle | Secondary | Other |
|------------|---------------|----------------------|------|--------|---------|--------|-----------|-------|
| 10/02      | Pilots        | 200                  | 11   | 89     | 51      | 1      | 29        | 19    |
| 04/03      | 1             | 375                  | 6    | 94     | 62      | 2      | 13        | 23    |
| 10/03      | 2             | 525                  | 9    | 91     | 51      | 3      | 33        | 13    |
| 05/04      | 3             | 600                  | 5    | 95     | 74      | 1      | 15        | 10    |
| 10/04      | 4             | 600                  | 5    | 95     | 66      | 3      | 18        | 13    |
| 04/05      | 5             | 600                  | 8    | 92     | 64      | 3      | 25        | 8     |
| 11/05      | 6             | 600                  | 4    | 96     | 71      | 2      | 14        | 13    |

**Figure 4.1: CSBM candidates by prior level of qualification****CSBM Candidates Prior Level of Qualification****4.5.2 Pre-course survey**

Prior to the induction of cohort 5, data collected on candidates commencing the course was as supplied on the application forms to NCSL. After cohort 5, in consultation with NCSL, we developed an instrument to gather data about candidates' perceptions of their jobs before they commenced the course.

**4.5.3 Observation at residential sessions**

These observations began with CSBM cohort 2, an overall group of around 570 candidates, which started in autumn 2003. Training was being provided by one of two contractors in each of the nine regions. Our aim was to visit one session in each region to ensure coverage across the country. Our visits were planned to ensure that the evaluation team saw at least one initial session and examples of second and third sessions. Observations were made in Cambridge, Chatham (twice), Stoke-on-Trent, Leeds, Bath, the Dunkenhalgh, Newcastle and London.

We were consistently very well received and were offered follow-up opportunities by at least 114 SBMs, giving a potentially large base for the interview aspects of the evaluation.

**Participant commitment**

We were impressed by the commitment and dedication of participants. Tutors engendered significant levels of commitment and participation in many sessions. Many participants told us that this was their first foray into a substantial learning programme since they had left school. The way in which so many of them tackled the course was a sign of the dedication and skill of many of the tutors. The first days of the second and third sessions were particularly challenging.

### **Tutoring and teaching rooms**

Whilst many sessions were exemplary, a few tutors risked “death by PowerPoint” (a phrase used by a tutor). This was due, we believe, to two factors: tutor background and teaching room layout.

Where tutors had a background in adult education or a strong teaching background, sessions were delivered with verve and flair. Where tutors were drawn from retired headteachers, we found greater reliance on PowerPoint presentations.

With the latter group there may have been a tendency to think that SBMs were functionaries who needed their ‘infinite’ wisdom. Our feeling was that some tutors did not see SBMs within a traditional adult learner’s paradigm, ie they were happy to be prescriptive and spoon-feed them. This was underlined by an ex-head tutor’s comment about making presentations:

*We’ve got these NCSL slides ... they’re pretty obvious, really.*

Overuse of PowerPoint was also more prevalent where rooms were smaller. In one case the room was very cramped and so there was no real possibility for break-out groups.

Observation of SBMs preparing presentations as part of the one second session suggested that, for many, this was an activity for which their previous experience had not prepared them. A different tutor recognised this and asked the group how many had done a presentation before. Four claimed to have done presentations, eight said they certainly never had and the remainder were unsure. A sensitising activity then followed which was designed to develop candidates’ confidence.

In spite of some candidate uncertainty about the presentation part of the assessment, our view is that this is a key feature and strength of the course, as it requires SBMs to respond to a real-life and, at times, difficult situation. As preparation for their later work with headteachers and governors, and in leading support staff, we believe that a presentation exercise and its assessment remains a vital and important part of the course.

### **Course materials: presentation and delivery**

Reactions to course materials at residential sessions have been mixed. In practical terms, some concerns were raised about the sheer bulk of the files and the practicalities of four-ring files and the staples in the workbooks or workshops. This was also noted by tutors. During some sessions there was confusion over materials, caused, we think, by the labelling of one set as ‘workbooks’ and the other as ‘workshops’. Some last-minute rewrites – eg one which altered a reference to ‘DOS’ to ‘older computers’ – appeared unnecessary. We received some comments

about some colours used in printing, in particular yellow. More recently, we have detected, from a minority of SBMs, concern about the provision of materials electronically. This is not a complaint which we think needs to be taken seriously other than to ensure that candidates are aware, when enrolling, that course materials will only be supplied electronically and that they should be prepared to download them.

### **Course materials: content**

The content of the materials has clearly been found useful, and in many cases very relevant. At one session we observed participants reporting on work they had done previously on health and safety issues. The course material was clearly very useful; as one candidate reported:

*The material is great, it's enabled me to rewrite our school's health and safety policy and bring it bang up to date ... Ours was last drawn up in 1993.*

Another remarked of the sample materials for a fictitious school called Mill Stream :

*The health and safety policy for Mill Stream has so much good stuff – I'd love to use it. But the people at our place won't relinquish – which is awful because what's in Mill Stream is so much better.*

Participants have told us that the workbooks are good, that the information they contain:

*is super, though the language is a bit "HE-ish".*

Although they found the files cumbersome, they saw them as an excellent reference base to which they intended to add.

Some of the materials used to support the wireless ICT task were very dated and need revision.

### **Assessment**

During all of our evaluation activities, assessment has been the issue which seems to have caused the greatest difficulty. This was still a topic of discussion in the third year of the evaluation. As a result of consultations with the BDP senior manager, we undertook further work in this area and in the spring of 2006 submitted a paper outlining our suggestions (see appendix 3).

There is little doubt that the issue was a difficult one, requiring a balance between robust and comprehensive assessment, ensuring consistency and quality in order to validate against IAM external qualifications, and resource constraints and logistical considerations.

At early evaluation meetings at residential sessions we found that course assessment was an issue for both candidates and tutors. We received some comments about the online module tests, which gave the candidate a score but didn't tell them what they got wrong. This meant that some formative learning potential was lost.



Several SBMs from cohort 2 claimed that they were coming up consistently in the enhancing category on the diagnostics. One candidate told us that she had:

*passed all the online module tests and did this without doing any of the set work because I felt confident and knew the answers.*

At this stage (cohort 2), many did not know about the DSBM course (which was being piloted at that time). It seems that as the programme has progressed, more fine-grained screening of candidates by NCSL has ensured that SBMs can be admitted to whichever course is more suitable for them.

The self-assessment elements were thought by many to be good and to be demanding, but some aspects of the paperwork were described as “rather overwhelming”. Many SBMs did not immediately appreciate the reflection elements during the education enterprise module. We understand and support the concept of the ‘reflective practitioner’. Listening to candidates at that time (2004), however, we felt that there may have been too much reflection in the course. Subsequently, as our interview data demonstrated (see section 4.6), we have found SBMs more open and receptive to the benefits that accrue in this way.

We received a number of comments from candidates indicating some anxiety about the assessment process. In the early stages (2004) these included:

*How many candidates are referred, and why?*

*How is the qualification valued in the market place?*

Such questions were understandable from candidates who were experiencing the course at an early stage of its development. For many this was their first continuing professional development (CPD) course since leaving school. Latterly (2006) many SBM posts stipulate that the CSBM is desirable or, in increasing numbers of cases, essential (see [www.bursarjobs.co.uk](http://www.bursarjobs.co.uk)).

It is important to record that, where concerns have been expressed, the programme team at NCSL has been quick to respond, providing ways forward for candidates. In a later session that we observed, it was clear that earlier concerns about assessment rubrics and what to expect at the assessment centres had been tackled. As a tutor remarked to the group:

*How can you do this properly if you don't know what the criteria are?  
So we'll be explaining.*

Candidates were shown a role-play of how an assessment centre was run, what to expect and, very importantly, what was required in their case studies and portfolios and how to make their presentations.



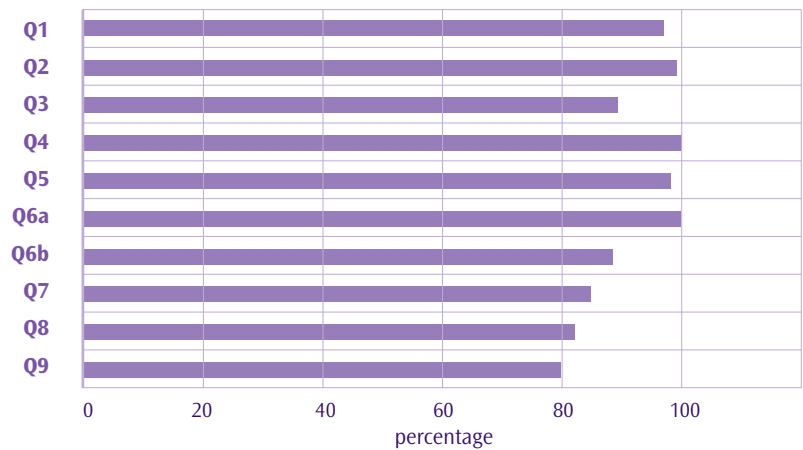
We have consistently emphasised the importance of clarity about assessment objectives. Little is more likely to upset learners than being unsure about what is being assessed and how. This may be a factor behind the number of withdrawals from the course after the third session. The recent CSBM redesign, which changes the mode of assessment from end-loaded to continuous, may go a long way towards reducing withdrawals.

4.5.4 Residential session satisfaction surveys

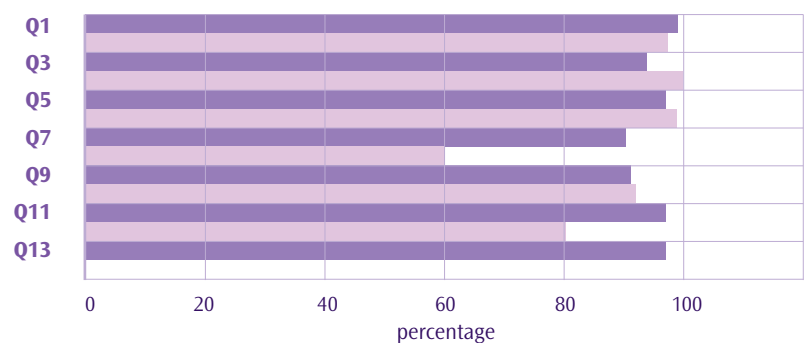
Course satisfaction data has been supplied by the candidates (see appendix 2 for a copy of the two instruments employed). Data after the first residential session is shown in figure 4.2a, from a convenience sample of 232 candidates; data after the second and third residential sessions is shown in figure 4.2b, from a convenience sample of 458 candidates. The figures, showing percentages responding at or above 2 on a 4-point satisfaction scale, indicate a very high degree of course satisfaction.

Figure 4.2a: CSBM satisfaction after first residential session

CSBM Satisfaction After First Residential



In figure 4.2a, question 9 (at 78.7 per cent) relates to candidates’ initial training with talk2learn.

**Figure 4.2b: CSBM satisfaction after second and third residential sessions****CSBM Course Satisfaction**

In figure 4.2b, question 8 (at 59.9 per cent) relates to candidates' ratings of 'planning further work for my case study project'.

#### 4.5.5 Course impact

##### 4.5.5.1 KnoCon assessment

In the early stages of the evaluation, to understand how SBMs perceived their prior knowledge and confidence in key course areas, we devised a questionnaire which we refer to as 'KnoCon'. The full questionnaire is presented in appendix 4. We received 282 replies, which are analysed below. Where a candidate did not respond to an item, the mean response to that item of all those who did reply was imputed.

The majority of respondents (164) were female. Only 22 indicated they were male, and 96 did not complete this item. Table 4.2 shows the phase of schooling respondents came from, and table 4.3 the centres where they undertook their training.

**Table 4.2: KnoCon sample, SBMs by school phase**

| Phase        | Frequency  | Percentage   |
|--------------|------------|--------------|
| Primary      | 140        | 49.6         |
| Secondary    | 103        | 36.5         |
| Special      | 22         | 7.8          |
| Other        | 13         | 4.6          |
| Missing      | 4          | 1.4          |
| <b>Total</b> | <b>282</b> | <b>100.0</b> |

**Table 4.3: KnoCon sample, centres from which responses were received**

| Region and venue                   | Frequency  | Percentage   |
|------------------------------------|------------|--------------|
| North East (Centre for Life)       | 25         | 8.9          |
| North west (Cheadle)               | 39         | 13.8         |
| Dunkenhalgh                        | 35         | 12.4         |
| Eastern (Cambridge)                | 10         | 3.5          |
| Burleigh                           | 26         | 9.2          |
| London (Theobalds Park)            | 72         | 25.5         |
| Majestic                           | 19         | 6.7          |
| West Midlands (Stoke-on-Trent)     | 5          | 1.8          |
| New Place                          | 19         | 6.7          |
| Oxford                             | 21         | 7.4          |
| Manchester Metropolitan University | 8          | 2.8          |
| Not identifiable                   | 3          | 1.1          |
| <b>Total</b>                       | <b>282</b> | <b>100.0</b> |

The questionnaire asked candidates to indicate their perceived level of knowledge and confidence on 26 items taken from key aspects of the course materials. They were asked to respond on a 6-point scale for which the mean would be 3.5. This data allowed examination of mean scores for each item on both the knowledge and the confidence scales. The data is presented, respectively, in tables A5.1 and A5.2 in appendix 5.

Analysis using a paired samples t-test permitted comparison of levels of knowledge and of confidence for each item. The full outputs from these t-tests are presented in table A6.1 in appendix 6.

The key outcome is that, for 18 items, the mean knowledge and confidence scores were significantly different. For all of these, SBMs reported higher mean knowledge scores, ie they appeared to be saying they needed to increase their confidence in all areas (this is particularly interesting in the light of the interview data presented in section 4.4).

There were 7 knowledge items where mean scores were above 4; of these, 5 also appeared above 4 on the confidence scale. There were 9 items where the mean score was between 3 and 3.99, and 10 items where the mean score was below 3. This data, particularly where the means were below 3, provided an insight into aspects of the course which would benefit from further investigation and development. Those items scoring below 3 on both knowledge and confidence scales were:

- collective bargaining
- ICT in Independent Learning System (ILS) maintenance and development
- facilities planning procedures
- estate management
- vehicle and transport management
- catering services procedures
- fixed asset management procedures
- risk management procedures
- loss prevention procedures
- evaluation procedures for business services

Further analysis, using an independent samples t-test, enabled comparisons of confidence between primary and secondary SBMs across the same items. Results are shown in table A6.2 (appendix 6). Here, in only 6 out of the 26 items did primary SBMs indicate a higher mean confidence score than their secondary colleagues. Interestingly these six items were:

- cash management
- ICT in ILS provision
- ICT in ILS maintenance and development
- use of management information systems
- health and safety procedures
- communication procedures

Primary mean scores dropped below 2 on two items: confidence in collective bargaining; and vehicle and transport management.

Data in table A6.3 (appendix 6) shows the output of an independent samples t-test indicating those items where mean confidence scores for primary and secondary SBMs were significantly different. The items where this occurred were:

- principles of accounting
- auditing and financial reporting
- investment and debt management
- staff development
- labour relations
- collective bargaining
- facilities planning procedures
- maintenance and operation procedures
- estate management
- vehicle and transport management
- catering services procedures
- fixed asset management procedures
- evaluation procedures for business services

Without exception secondary SBMs reported higher levels of confidence. This data supports the policy decision to provide more training places for primary SBMs, as not only are there more of them but they are indicating a lower level of confidence than their secondary counterparts.

An independent samples t-test was also performed on knowledge scores, enabling comparisons between primary and secondary SBMs' perceptions of their knowledge across the same items. Results are shown in table A6.4 (appendix 6). Here, in only 3 of the 26 items did primary SBMs indicate a higher mean knowledge score than their secondary colleagues:

- ICT in ILS provision
- ICT in ILS maintenance and development
- use of management information systems (MIS)

This data shows some important aspects of candidates' perceptions of their knowledge in areas relating to their work. Primary candidates rated themselves at a low level of knowledge about vehicle and transport management. Both primary and secondary candidates scored themselves low on knowledge about collective bargaining and about loss-prevention procedures. Table A6.5 (appendix 6) presents results of an independent samples t-test exploring the differences between mean primary and secondary knowledge scores. There were 14 items where differences were significant and in all cases, secondary SBMs reported a higher mean knowledge score:

- principles of accounting
- auditing and financial reporting
- investment and debt management
- staff development
- labour relations
- collective bargaining
- payroll procedures
- facility planning procedures
- maintenance and operation procedures
- estate management
- vehicle and transport management
- catering services procedures
- fixed asset management procedures
- evaluation procedures for business services

This data confirms that the original intention to provide more CSBM places for primary SBMs was correct.

#### 4.5.5.2 Early impact indications from cohort 2 SBMs

The vast majority of SBMs with whom we held conversations reported very favourably on the course and its impact. In particular, they told us how they believed the course had impacted on them personally and, in particular, increased their confidence. The following comments exemplify this.

*I just want to put all this into practice.*

*I'm excited with all the tools which this course gives me.*

*I feel different when talking to school stakeholder groups now.*

*The course seemed daunting at the start – but now it's really good.*

Another SBM told us:

*I'm also a governor and the head is very supportive of me on this course. I'm involved in interviews. I asked my head where she saw the SBM role – she said on a par with a deputy head.*

Impact was not consistent however: some commented that they were not finding everything as easy back at school where, as a result of the course, they might want to change things. In particular, some heads, SMTs and governors held views that did not accord with how SBMs' thinking is developing as a result of the course. One candidate reported:

*The head said to me to put down in the budget for a school business manager ... Hello, who am I? What's this for?*

Another indicated that their chair of governors asked:

*Do SBMs work in primary schools? (implying that they don't).*

Another reported that:

*I feel deflated – I'm just used to take the minutes at the SMT meetings ... we have nothing on file about risk, and ours is a school which burned down.*

Other difficulties were reported when dealing with some local authorities:

*We want to get on with appointing cover supervisors but the local authority is holding us back because the contracts have not been sorted yet ... School's ready, but it's the local authority who are putting the brakes on.*

Another added:

*Our local authority is far too expensive – on lots of building stuff – we've gone to tender and found cheaper elsewhere. The trouble is the local authority haven't changed their mind-set – we're now a customer.*

At an early stage, SBMs were telling us they felt their confidence was considerably enhanced by the course. However, we have received conflicting reports of headteachers. For some SBMs, the course enabled them to expand their roles, raising the profile of the business administration side of the school. This was welcomed by their heads who saw this as an opportunity to focus more on strategic direction and on teaching and learning. Other SBMs reported that, in spite of their head having endorsed their participation on the course, they thought the head felt threatened by what they had learnt:

*My head says when I've finished this course I'll be invited to management meetings, **when appropriate**.*



*In our recent Ofsted inspection draft report, the inspectors referred to the 'SBM' ... but our head insisted that the term be removed from the draft report – as if to say I'm not part of the place.*

Other issues which were brought to our attention in the early stages included:

- limited potential for advancement and promotion
- the need to draw head teachers into the programme
- the need for attention to mentoring skills for headteachers

#### 4.5.6 CSBM impact survey findings

In 2005, in conjunction with key staff at NCSL, we developed a survey to assess impact as perceived by SBMs who had completed the course. The survey instrument is described in chapter 3 and presented in appendix 7. A total of 283 SBMs completed this survey, and the important outcomes are presented here.

##### 4.5.6.1 Changes in the SBM role

In line with findings in other surveys such as the University of Lincoln baseline study (University of Lincoln, 2004), our respondents revealed a wide range of job titles for the work they do. In total among CSBM graduates, 44 different job titles were reported, of which the most common were:

- bursar, 51 (27.8 per cent)
- school business manager, 27 (14.7 per cent)
- office manager, 16 (8.7 per cent)
- finance officer, 11 (6 per cent)
- admin officer, 9 (4.9 per cent)
- school administrator, 8 (4.4 per cent)

As a measure of impact, graduates were asked if their job title had changed *as a result of completing CSBM*. Table 4.4 shows that over one-third of SBMs in the sample indicated that it had.

**Table 4.4: Has your job title changed as a result of CSBM?**

|              | Frequency  | Percentage   |
|--------------|------------|--------------|
| Yes          | 104        | 37.0         |
| No           | 177        | 63.0         |
| <b>Total</b> | <b>281</b> | <b>100.0</b> |
| Missing      | 2          | –            |
| <b>Total</b> | <b>283</b> | <b>–</b>     |

Evidence of the importance attached to the SBM role in schools was sought in terms of SMT membership. Table 4.5 presents SMT membership data according to school phase.

**Table 4.5: School phase and SMT membership**

| Phase        |                       | SMT?         |              | Total         |
|--------------|-----------------------|--------------|--------------|---------------|
|              |                       | Yes          | No           |               |
| Primary      | Count                 | 80           | 111          | <b>191</b>    |
|              | % within phase        | 41.9%        | 58.1%        | <b>100.0%</b> |
| Middle       | Count                 | 7            | 1            | <b>8</b>      |
|              | % within phase        | 87.5%        | 12.5%        | <b>100.0%</b> |
| Secondary    | Count                 | 29           | 32           | <b>61</b>     |
|              | % within phase        | 47.5%        | 52.5%        | <b>100.0%</b> |
| Other        | Count                 | 6            | 3            | <b>9</b>      |
|              | % within phase        | 66.7%        | 33.3%        | <b>100.0%</b> |
| Missing      | Count                 | 2            | 6            | <b>8</b>      |
|              | % within phase        | 25.0%        | 75.0%        | <b>100.0%</b> |
| <b>Total</b> | <b>Count</b>          | <b>124</b>   | <b>153</b>   | <b>277</b>    |
|              | <b>% within phase</b> | <b>44.8%</b> | <b>55.2%</b> | <b>100.0%</b> |

Overall this data marks a significant advance, showing that just under half of SBMs in the sample were members of the SMT. This is a significant advance on results reported by Wallace and Hall (1994), where only 15 per cent of SBMs were on the SMT. In spite of this progress, just over half of SBMs are still not members of their SMT – although many do attend or provide work for their SMT.

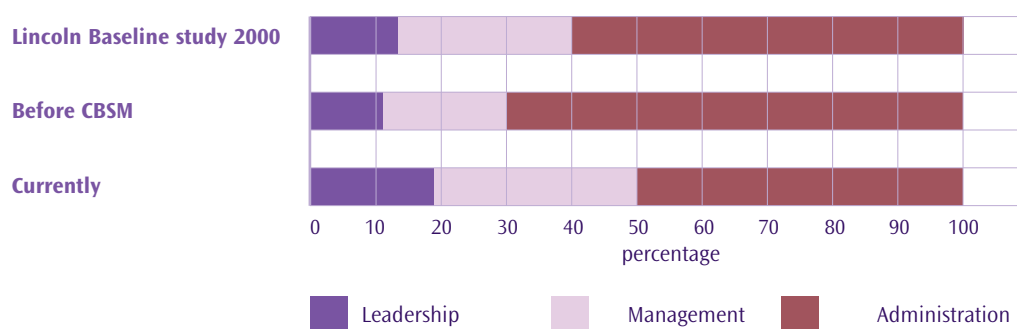
In the context of the school workforce remodelling agenda, where there are increasing numbers of support staff in schools, we asked SBMs about the numbers of support staff they managed. This is a further indication of their developing and growing role. Our CSBM graduate sample was managing a total of 2,265 support staff; an average of just over 8 per SBM; one SBM reported managing 100 support staff.

Of critical interest are SBMs' perceptions of how they spent their time. Respondents were asked to estimate what proportion of their time they spent on leadership, management and administration – key elements in the course. Leadership refers to activities which deal with the strategic direction of the school. Management is about planning, organising, directing, controlling, coordinating and evaluating activities. Administration is about ensuring that appropriate systems are in place for the organisation to function effectively.

Respondents were asked to provide data relating to two occasions: at the time of this survey and before they undertook the CSBM course. Overall comparisons are shown in figure 4.3.

**Figure 4.3: SBMs' estimated time expenditure (n=283)**

#### SBMs estimation of how they spend their time



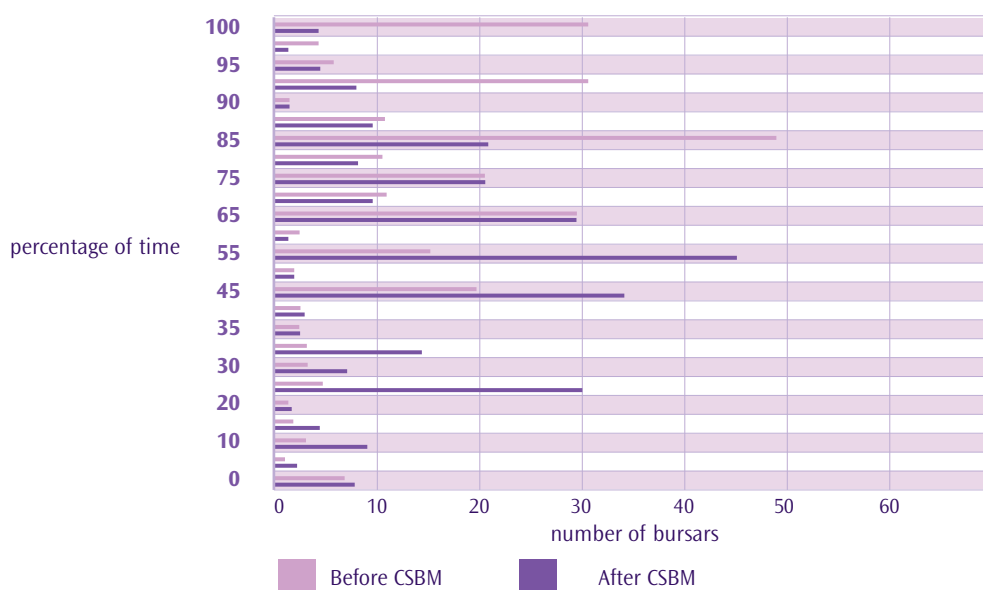
More detailed examination of the data revealed that whereas 98 SBMs (35 per cent) reported no change in terms of leadership, 166 (59.4 per cent) indicated that leadership time had increased. When this was examined further in terms of school phase, 58.4 per cent of primary SBMs were spending more time on leadership activities but for secondary SBMs the figure was lower, at 51.6 per cent.

In terms of management activities, 102 CSBM graduates (36.5 per cent) reported no change, 15 (5 per cent) indicated a decrease and the majority, 162 (58 per cent), indicated that they were now spending more time on management activities than previously. In terms of school phase, 116 primary SBMs (61.1 per cent) were reporting an increase in management time whereas 31 of their secondary colleagues (50 per cent) indicated an increase.

Time spent on administrative tasks provided the most interesting data. Given that data on both leadership and management tasks showed an increase, a decrease in the time spent on administration was expected. Figure 4.4 shows clearly the extent to which this has taken place.

**Figure 4.4: Time spent on administration before and after CSBM (n=283)**

#### Time on Administration



Prior to CSBM, almost 50 per cent of the sample – 139 SBMs – indicated that over 75 per cent of their time was spent on administration. Whilst a concern in developing the school business management role was that SBMs would become recipients of excessive administrative burdens as part of the drive to relieve pressure on teachers and headteachers, our sample confirmed that this has not occurred. Many SBMs we spoke to reported that schools were employing more staff for routine administrative duties, eg the 24 tasks which were part of the school workforce remodelling agenda. Across the sample as a whole, 85 SBMs (30.3 per cent) reported no change, but 183 (65.3 per cent) indicated that, after CSBM, their administrative load had decreased. Within the primary phase, the data is almost the same: 55 or 28.7 per cent indicated no change, 9 or 4.7 per cent indicated an increase and 127 or 66.4 per cent indicated a reduction. **The greatest reduction in time spent on administration has occurred amongst SBMs who had previously reported devoting substantial time (over 75 per cent) to administration.** For many, this represented a significant change and an important impact of the course.

#### 4.5.6.2 SBMs' assessment of course impact

A key impact of the course has been the reported improvement in understanding of core material. As a consequence SBMs perceived that they were having a positive impact on their schools. In this section the key course elements – health and safety; facilities; ICT; management learning; financial management; HRM; administration; risk management and strategic development of the school – form the basis for analysis.

For each course module a cross-tabulation was plotted, showing candidates' reported understanding (very much better, better, about the same) against their reported impact (on a five-point scale, where 1 represented a big impact and 5 little impact). Amalgamation of the top two impact categories and the lowest two produced three levels of impact. The top two levels of understanding were also amalgamated. In the resultant 3-by-2 presentation (table 4.6), the most positive position is at the top left.

**Table 4.6: Categories of SBMs reporting impact and understanding**

|                              | Big impact         |          | Little impact |
|------------------------------|--------------------|----------|---------------|
| Increased understanding      | Movers and shakers | Hopefuls | Strugglers    |
| Understanding about the same | Knew it before     | Coasters | No change     |

The sample was grouped by position in this matrix, and the groups named: 'Movers and shakers', 'Hopefuls', 'Strugglers', 'Knew it before', 'Coasters' and 'No change'. This framework is used to present the impact for each key area and provides a basis for further evaluation.

### Health and safety

In terms of health and safety, table 4.7 indicates that half the sample reported strong understanding and strong impact. Over a quarter had improved their understanding and *hopefully* will have impact in the near future.

A small group were *struggling*, having improved their understanding but not yet having a real impact. This group represents those who reported increased learning as a result of the course but were finding difficulty in applying their learning in their schools. These candidates may benefit from continued support through the SBM online community.

**Table 4.7: Impact and understanding of health and safety module, CSBM**

| Health and safety impact                   |                             |           |                   |                     |           |   |
|--|-----------------------------|-----------|-------------------|---------------------|-----------|---|
|  | Big impact                  |           |                   | Little impact       |           | Total   |
| Health & safety understanding              | 1                           | 2         | 3                 | 4                   | 5         |   |
| Very much better                           | 46                          | 47        | 42                | 8                   | 7         | 151   |
| Better                                     | 21                          | 25        | 32                | 15                  | 6         | 100   |
| About the same                             | 6                           | 5         | 9                 | 4                   | 2         | 26  |
| <b>Total</b>                               | <b>73</b>                   | <b>77</b> | <b>83</b>         | <b>27</b>           | <b>15</b> | <b>277</b>                                      |
| Understand more and having impact          | 50.1%<br>Movers and shakers |           | 26.7%<br>Hopefuls | 12.9%<br>Strugglers |           | Improved learning but not progressing           |
| Haven't learnt much new, but having impact | 3.9%<br>Knew it before      |           | 3.2%<br>Coasters  | 2.1%<br>No change   |           | Haven't learned much and not having much impact |

### Facilities

In terms of facilities, table 4.8 shows that half the sample reported strong understanding and strong impact. Well over a quarter had improved their understanding and *hopefully* will have impact in the near future.

A small group were *struggling*, having improved their understanding but not yet having, in their view, a real impact. A very small group indicated that their understanding had changed little and an even smaller group reported no real impact. With the two areas of health and safety and facilities, over 90 per cent of respondents said that their learning had increased. The message for future programme development is clear – these modules should be retained.

**Table 4.8: Impact and understanding of facilities module, CSBM**

| Facilities impact        |            |           |           |               |          |            |
|--------------------------|------------|-----------|-----------|---------------|----------|------------|
|                          | Big impact |           |           | Little impact |          | Total      |
| Facilities understanding | 1          | 2         | 3         | 4             | 5        |            |
| Very much better         | 42         | 44        | 44        | 11            | 4        | <b>146</b> |
| Better                   | 22         | 36        | 33        | 12            | 5        | <b>109</b> |
| About the same           | 10         | 6         | 3         | 2             | 0        | <b>21</b>  |
| <b>Total</b>             | <b>74</b>  | <b>86</b> | <b>80</b> | <b>25</b>     | <b>9</b> | <b>276</b> |

|  |                             |                   |                     |   |
|--|-----------------------------|-------------------|---------------------|---|
| Understand more and having impact          | 52.1%<br>Movers and shakers | 27.8%<br>Hopefuls | 11.5%<br>Strugglers | Improved learning but not progressing           |
| Haven't learnt much new, but having impact | 5.7%<br>Knew it before      | 1.1%<br>Coasters  | 0.7%<br>No change   | Haven't learned much and not having much impact |



## ICT

The graduates' perceptions of the ICT module (see table 4.9) presented a more complicated picture. Just over two-fifths indicated that their understanding was unchanged. This is in stark contrast to the very high satisfaction levels with all aspects of course delivery. Levels of impact on ICT in school were also noticeably lower than for other modules. A possible explanation is that candidates had a much higher level of prior knowledge in this area and were not challenged as strongly as in other modules. It is clear that this merits further investigation.

**Table 4.9: Impact and understanding of ICT module, CSBM**

| ICT impact        |            |           |           |               |           |            |
|-------------------|------------|-----------|-----------|---------------|-----------|------------|
|                   | Big impact |           |           | Little impact |           | Total      |
| ICT understanding | 1          | 2         | 3         | 4             | 5         |            |
| Very much better  | 8          | 14        | 18        | 6             | 2         | 48         |
| Better            | 9          | 24        | 43        | 27            | 10        | 114        |
| About the same    | 15         | 28        | 35        | 26            | 10        | 115        |
| <b>Total</b>      | <b>32</b>  | <b>66</b> | <b>96</b> | <b>59</b>     | <b>22</b> | <b>277</b> |

|  |                             |                   |                     |   |
|--|-----------------------------|-------------------|---------------------|---|
| Understand more and having impact          | 19.8%<br>Movers and shakers | 22.0%<br>Hopefuls | 16.2%<br>Strugglers | Improved learning but not progressing           |
| Haven't learnt much new, but having impact | 15.5%<br>Knew it before     | 12.6%<br>Coasters | 12.9%<br>No change  | Haven't learned much and not having much impact |

### Management learning

Table 4.10 shows that just under half the sample reported strong understanding and strong impact in the area of management learning. Well over a quarter were in the position of having improved their understanding and *hopefully* will have impact in the near future. A small group had improved their understanding but as yet were not having a real impact. A very small group indicated that their understanding had changed little and an even smaller group reported no real impact.

**Table 4.10: Impact and understanding of management learning module, CSBM**

| Management learning impact        |            |            |           |               |           |            |
|-----------------------------------|------------|------------|-----------|---------------|-----------|------------|
|                                   | Big impact |            |           | Little impact |           | Total      |
| Management learning understanding | 1          | 2          | 3         | 4             | 5         |            |
| Very much better                  | 29         | 38         | 26        | 11            | 3         | 107        |
| Better                            | 13         | 55         | 46        | 9             | 8         | 132        |
| About the same                    | 9          | 7          | 13        | 7             | 0         | 37         |
| <b>Total</b>                      | <b>51</b>  | <b>101</b> | <b>85</b> | <b>27</b>     | <b>11</b> | <b>276</b> |

|  |                             |                   |                     |   |
|--|-----------------------------|-------------------|---------------------|---|
| Understand more and having impact          | 48.9%<br>Movers and shakers | 26.0%<br>Hopefuls | 11.2%<br>Strugglers | Improved learning but not progressing           |
| Haven't learnt much new, but having impact | 5.7%<br>Knew it before      | 4.7%<br>Coasters  | 2.5%<br>No change   | Haven't learned much and not having much impact |

### Financial management

An important outcome of this data is that substantial numbers of SBMs appear to be having impact in matters of financial management. In addition the numbers who considered that they are not having a significant impact is pleasingly low. Since over a third considered that their understanding was about the same, this suggests that the content of this module might be worth revisiting. This is important in the light of changes to requirements about financial management in schools.

**Table 4.11: Impact and understanding of financial management module, CSBM**

| Financial management impact        |            |           |           |               |           |            |
|------------------------------------|------------|-----------|-----------|---------------|-----------|------------|
|                                    | Big impact |           |           | Little impact |           | Total      |
| Financial management understanding | 1          | 2         | 3         | 4             | 5         |            |
| Very much better                   | 42         | 14        | 4         | 2             | 0         | 63         |
| Better                             | 50         | 34        | 11        | 6             | 4         | 106        |
| About the same                     | 75         | 16        | 8         | 3             | 6         | 108        |
| <b>Total</b>                       | <b>167</b> | <b>64</b> | <b>23</b> | <b>11</b>     | <b>10</b> | <b>277</b> |

|  |                             |                  |                    |   |
|--|-----------------------------|------------------|--------------------|---|
| Understand more and having impact          | 50.5%<br>Movers and shakers | 5.4%<br>Hopefuls | 4.3%<br>Strugglers | Improved learning but not progressing           |
| Haven't learnt much new, but having impact | 32.8%<br>Knew it before     | 2.8%<br>Coasters | 3.2%<br>No change  | Haven't learned much and not having much impact |

We considered the possibility that there might have been a correlation between prior qualifications of this group and those whose understanding had not improved. The results, shown below in table 4.12, were inconclusive.

**Table 4.12: Prior qualifications of financial management ‘Knew it before’ group**

|                       | Frequency | Percentage   |
|-----------------------|-----------|--------------|
| GCSE or O-level       | 18        | 19.8         |
| A level               | 10        | 11.0         |
| NVQ                   | 12        | 13.2         |
| Accounting technician | 16        | 17.6         |
| First degree          | 12        | 13.2         |
| Masters degree        | 1         | 1.1          |
| Other                 | 22        | 24.2         |
| <b>Total</b>          | <b>91</b> | <b>100.0</b> |

Similarly, an analysis of SBMs’ highest prior qualification showed A-level, national vocational qualification (NVQ) and accounting technician evenly distributed between secondary and primary schools.

Human resource management

With the human resource management (HRM) module, over four-fifths of graduates indicated that the module had helped their understanding and half of the sample reported high levels of impact.

Table 4.13: Impact and understanding of HRM module, CSBM

| HRM impact        |            |    |    |               |    |       |
|-------------------|------------|----|----|---------------|----|-------|
|                   | Big impact |    |    | Little impact |    | Total |
| HRM understanding | 1          | 2  | 3  | 4             | 5  |       |
| Very much better  | 31         | 32 | 14 | 12            | 2  | 92    |
| Better            | 31         | 49 | 35 | 14            | 9  | 139   |
| About the same    | 15         | 13 | 9  | 9             | 0  | 46    |
| Total             | 77         | 94 | 58 | 35            | 11 | 277   |

|  |                             |                   |                     |   |
|--|-----------------------------|-------------------|---------------------|---|
| Understand more and having impact          | 51.6%<br>Movers and shakers | 17.6%<br>Hopefuls | 13.3%<br>Strugglers | Improved learning but not progressing           |
| Haven't learnt much new, but having impact | 10.1%<br>Knew it before     | 3.2%<br>Coasters  | 3.2%<br>No change   | Haven't learned much and not having much impact |

### Administration

Results from this module are interesting in light of results on the reduction in the time SBMs spent on administration (see figures 4.3 and 4.4). Yet in table 4.14 below, only 40 per cent of the sample indicated that this module had both improved their understanding and led to an impact in school.

**Table 4.14: Impact and understanding of administration module, CSBM**

#### Administration impact

|                              | Big impact |           |           | Little impact |           | Total      |
|------------------------------|------------|-----------|-----------|---------------|-----------|------------|
| Administration understanding | 1          | 2         | 3         | 4             | 5         |            |
| Very much better             | 22         | 14        | 6         | 0             | 0         | 42         |
| Better                       | 47         | 27        | 15        | 9             | 6         | 105        |
| About the same               | 63         | 29        | 19        | 12            | 6         | 130        |
| <b>Total</b>                 | <b>132</b> | <b>70</b> | <b>40</b> | <b>21</b>     | <b>12</b> | <b>277</b> |

|  |                             |                  |                    |   |
|--|-----------------------------|------------------|--------------------|---|
| Understand more and having impact          | 39.7%<br>Movers and shakers | 7.5%<br>Hopefuls | 5.4%<br>Strugglers | Improved learning but not progressing           |
| Haven't learnt much new, but having impact | 33.2%<br>Knew it before     | 6.8%<br>Coasters | 6.4%<br>No change  | Haven't learned much and not having much impact |

To explore the level of impact, the data set was partitioned, focusing on the 'Movers and shakers' group. Their reported use of time for administration before and after CSBM was compared and is presented in figure 4.5.

This figure shows quite clearly the dramatic change in time spent on administration. In terms of the module as a whole, this may need review given that another third of graduate respondents (the 'Knew it before' group) indicated that their understanding was about the same following the module. Evidently the course as a whole had helped the 'Knew it before' group as notwithstanding their minimal change in understanding, they too had reported significant impact in their schools. Further analysis of this group against their reported individual professional growth did not reveal anything which distinguished them from the rest of the sample.

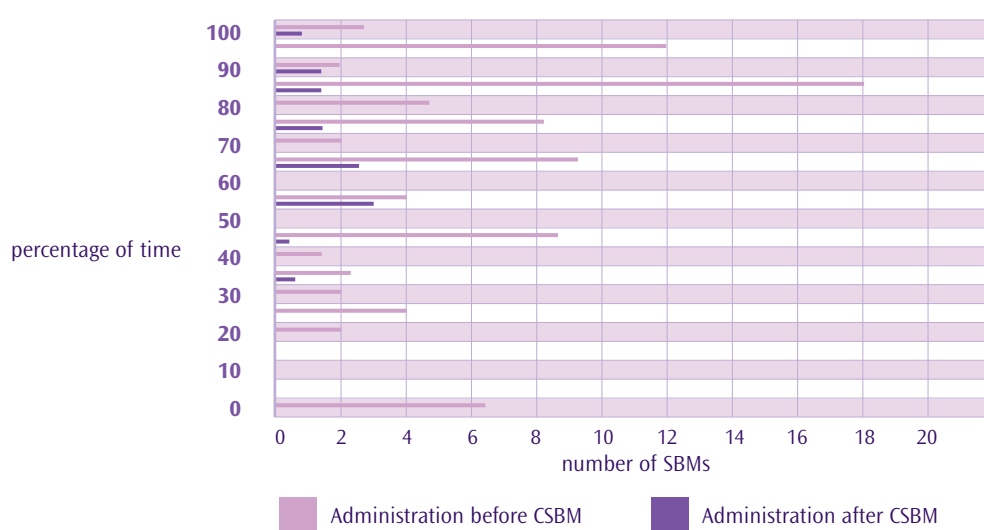
**Figure 4.5: Impact on time spent on administration, 'Movers and shakers' (n=110)****Impact of 'Movers and shaker' SBMs on time spent on administration****Risk management**

Table 4.15 indicates strongly that less than 10 per cent of the sample already knew much about risk management. This module appears to be an important component in the course, one which clearly has impacted on the graduates and their schools. Three-quarters of graduates were having some impact in this area and nearly half claimed to be making a big impact.

**Table 4.15: Impact and understanding of risk management module, CSBM****Risk management impact**

|                               | Big impact |           |           | Little impact |           | Total      |
|-------------------------------|------------|-----------|-----------|---------------|-----------|------------|
| Risk management understanding | 1          | 2         | 3         | 4             | 5         |            |
| Very much better              | 45         | 39        | 43        | 11            | 9         | 148        |
| Better                        | 16         | 31        | 36        | 15            | 5         | 106        |
| About the same                | 2          | 3         | 10        | 5             | 3         | 23         |
| <b>Total</b>                  | <b>63</b>  | <b>73</b> | <b>89</b> | <b>31</b>     | <b>17</b> | <b>277</b> |



|  |                             |                   |                     |   |
|--|-----------------------------|-------------------|---------------------|---|
| Understand more and having impact          | 47.9%<br>Movers and shakers | 28.9%<br>Hopefuls | 14.6%<br>Strugglers | Improved learning but not progressing           |
| Haven't learnt much new, but having impact | 1.8%<br>Knew it before      | 3.6%<br>Coasters  | 2.9%<br>No change   | Haven't learned much and not having much impact |

### Strategic development of the school

Table 4.16 indicates that for most graduates, strategic development was an area in which their understanding had increased substantially as a result of the course. Almost two-fifths considered that they were already having a big impact in this area and around a further third considered that they too were beginning to make an impact.

**Table 4.16: Impact and understanding of strategic development module, CSBM**

| Strategic development impact        |            |           |           |               |           |            |
|-------------------------------------|------------|-----------|-----------|---------------|-----------|------------|
|                                     | Big impact |           |           | Little impact |           | Total      |
| Strategic development understanding | 1          | 2         | 3         | 4             | 5         |            |
| Very much better                    | 29         | 46        | 39        | 10            | 9         | <b>133</b> |
| Better                              | 7          | 23        | 43        | 27            | 14        | <b>114</b> |
| About the same                      | 1          | 10        | 4         | 6             | 7         | <b>28</b>  |
| <b>Total</b>                        | <b>37</b>  | <b>79</b> | <b>86</b> | <b>43</b>     | <b>30</b> | <b>275</b> |

|  |                             |                   |                     |   |
|--|-----------------------------|-------------------|---------------------|---|
| Understand more and having impact          | 38.2%<br>Movers and shakers | 29.8%<br>Hopefuls | 21.8%<br>Strugglers | Improved learning but not progressing           |
| Haven't learnt much new, but having impact | 4.0%<br>Knew it before      | 1.5%<br>Coasters  | 4.7%<br>No change   | Haven't learned much and not having much impact |

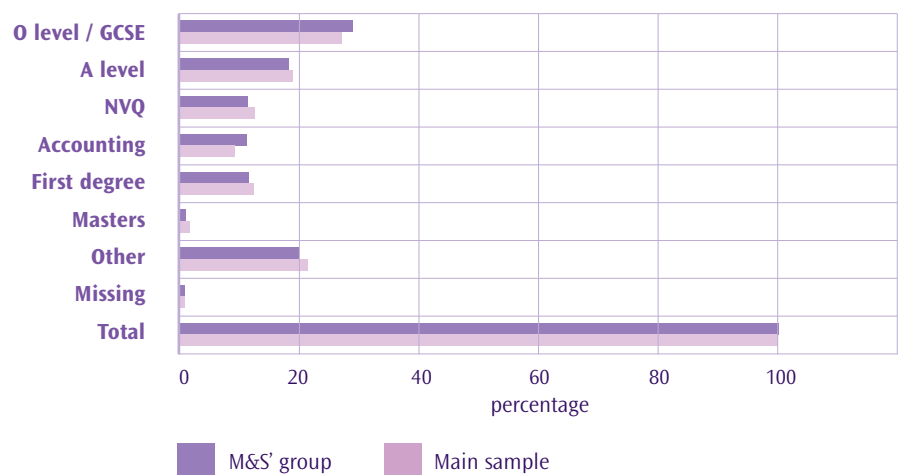
The outcome in this area is a significant development emerging from the course. From this analysis, the 'Movers and shakers' group could be argued to represent the **core of really successful business managers**. Consequently members of this group were traced through responses which they had made to other key items on the impact survey. The following subsection sets out our findings.

#### 4.5.6.3 ‘Movers and shakers’: strategic development impact

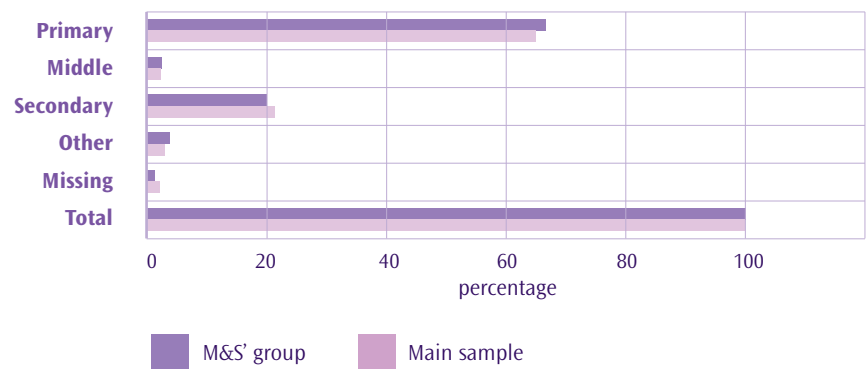
This group reported that their understanding of issues of strategic development were ‘better’ or ‘very much better’ whilst also saying that that they were having a ‘big impact’ on their schools. Some key factors are present in this group. They are more likely to be SMT members (67.6 per cent compared with 43.8 per cent in the main sample). Interestingly the profile of their highest qualifications (see figure 4.6) is indistinguishable from the main sample. This is important to note as SBMs have a wide range of educational qualifications and there were concerns over whether some had the academic background to undertake the course.

**Figure 4.6: ‘Movers and shakers’ and main sample: qualifications**

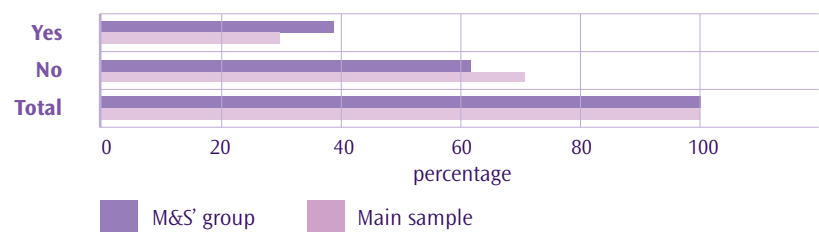
**‘M&S’ group and main sample: qualifications compared**



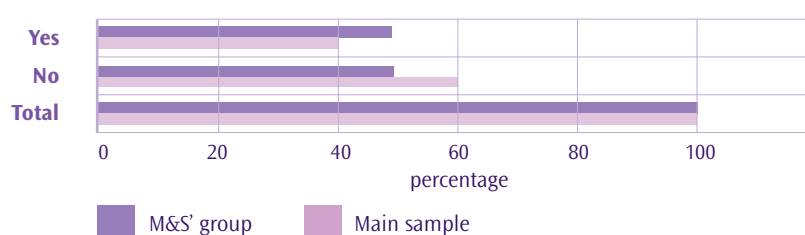
The phase of schooling for ‘Movers and shakers’ was checked for a preponderance of any phase, especially given the assumption that only secondary schools have ‘real’ SBMs. Figure 4.7 shows this comparison. Again, the ‘Movers and shakers’ group was not radically different from the main sample.

**Figure 4.7: 'Movers and shakers' and main sample: school phase****'M&S' group and main sample: school phase compared**

When the 'Movers and shakers' were compared with the main sample in terms of a range of outcomes gathered through the impact survey, it becomes clear that, across a wide range of aspects of the role and in relation to key parts of the course, the 'Movers and shakers' are a distinct entity. They represent 37.1 per cent of the main sample. In terms of sourcing new money for their schools, their performance is well above the main sample, as figure 4.8 shows.

**Figure 4.8: 'Movers and shakers' and main sample: sourcing of new money****'M&S' group and main sample: sourcing new money compared**

Similarly, in terms of money saved, figure 4.9 demonstrates the substantial contribution made by this group of SBMs to their schools.

**Figure 4.9: ‘Movers and shakers’ and main sample: savings****‘M&S’ group and main sample: savings compared**

The average amount saved by the ‘Movers and shakers’ was £8,479, compared with £5,782 for the main sample. Average new money was £45,661 for the ‘Movers and shakers’, which is more than double the figure of £21,417 for the main sample.

Data on new money and money saved by the ‘Movers and shakers’ group appears even more impressive when compared by phase with the main sample; see table 4.17.

**Table 4.17: ‘Movers and shakers’ and main sample: average per pupil savings and new money**

| Group                              | Mean money | Mean NOR | Average per pupil |
|------------------------------------|------------|----------|-------------------|
| All secondary saving               | £7,000     | 897      | £7–80             |
| All primary saving                 | £3,951     | 269      | £14–68            |
| ‘M&S’ secondary saving             | £13,714    | 933      | <b>£14–69</b>     |
| ‘M&S’ primary saving               | £4,575     | 252      | <b>£18–15</b>     |
| All secondary new                  | £44,450    | 897      | £49–55            |
| All primary new                    | £16,097    | 269      | £59–84            |
| ‘Movers and shakers’ secondary new | £110,615   | 933      | <b>£118–55</b>    |
| ‘Movers and shakers’ primary new   | £33,906    | 252      | <b>£134–54</b>    |

In terms of other aspects of the role, the ‘Movers and shakers’ group was managing on average nearly four more support staff each than the main sample. This group reported that after CSBM they were spending an average of 23.2 per cent of their time on leadership activities compared with 18.7 per cent in the main sample (this compares with only 11.6 per cent of their time on leadership activities prior to CSBM and 10.6 per cent for the main sample). The ‘Movers and shakers’ group reported substantial reductions in time on administration, down from 63.9 per cent to 41.3 per cent.

Table 4.18 compares them with the main sample across the seven module areas plus general management learning and strategic development, where the ratings were at the higher levels of 1 and 2 on a five-point scale.

**Table 4.18: ‘Movers and shakers’ and main sample: key course areas**

| Course area           | ‘Movers and shakers’ | Main sample (n=105) | Per cent difference (n=283) |
|-----------------------|----------------------|---------------------|-----------------------------|
| Health and safety     | 74.3                 | 53.8                | 20.5                        |
| Facilities            | 81.7                 | 57.6                | 24.1                        |
| ICT                   | 48.6                 | 35.1                | 13.5                        |
| Financial management  | 90.5                 | 82.8                | 7.7                         |
| HRM                   | 76.2                 | 61.3                | 14.9                        |
| Administration        | 77.1                 | 72.4                | 4.7                         |
| Risk management       | 64.8                 | 48.7                | 16.1                        |
| Management learning   | 81.9                 | 54.5                | 27.4                        |
| Strategic development | 100.0                | 41.6                | 58.4                        |

This data shows that those SBMs who achieve highly in terms of understanding the strategic development of the school and who claim a big impact in this area also **perform consistently more highly across all other aspects** of the CSBM course.

Finally, in terms of their personal development as professionals, table 4.19 compares replies of those from the ‘Movers and shakers’ group with the main sample who rated these items as 1 (high) on a five-point scale.

**Table 4.19: ‘Movers and shakers’ and main sample: personal development**

| CSBM impact on                 | % ‘Movers and shakers’ (n=105) | % Main sample (n=283) | Per cent difference |
|--------------------------------|--------------------------------|-----------------------|---------------------|
| Confidence                     | 76.2                           | 69.6                  | 6.6                 |
| Technical knowledge            | 20.0                           | 19.1                  | 0.9                 |
| Understanding of schools       | 44.8                           | 36.7                  | 8.1                 |
| Personal satisfaction          | 74.3                           | 64.7                  | 9.6                 |
| Ability to operate as a leader | 51.9                           | 39.0                  | 12.9                |

What emerges from this data as key about these two groups is the importance not of technical knowledge – the difference here is at its smallest – but of confidence, understanding of schools as organisations, personal satisfaction and above all the ability to operate as a leader. All of these are aspects which the CSBM course has sought to develop and engender in SBMs. We have no doubt that context has a role to play here, especially if SBMs are members of their SMT.

Almost without exception SBMs have reported very strongly in favour of the course and in terms of their satisfaction with it.

## 4.6 CSBM candidate interviews

### 4.6.1 Introduction

In total, 18 full interview transcripts from SBMs in primary, middle, secondary and special schools were available for analysis. Most SBMs were located in urban settings varying from market town to large metropolitan area. The pupil roll varied from 92 to 1,000, with length of service varying from 2 to 15 years.

The interview data is presented using the five areas which framed our interviews:

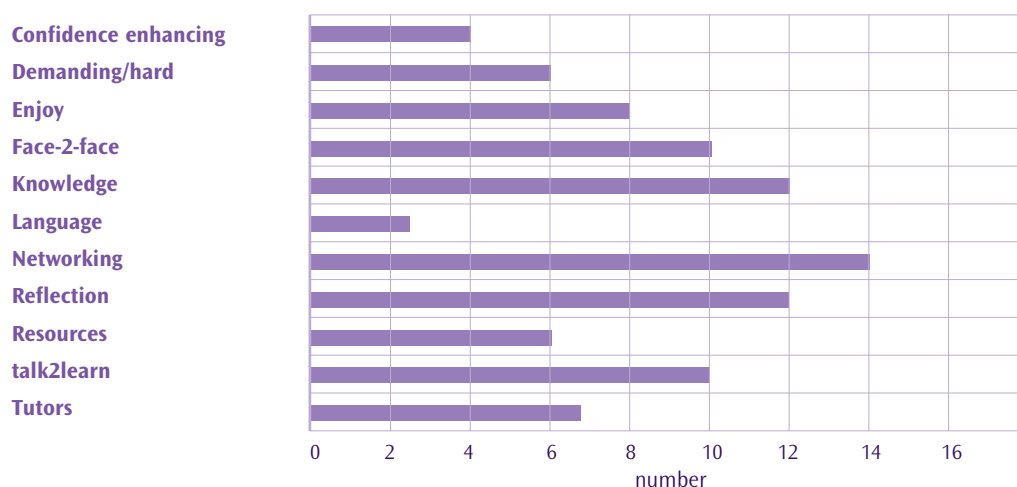
- what SBMs think about the CSBM course
- how SBMs see their school role and their aspirations
- how the course helped SBMs' personal development
- SBMs' relationships with their headteachers
- practical impact of the course on SBMs and their schools

### 4.6.2 What SBMs think about the CSBM course

Our analysis of the interviews yielded 71 coded quotations for this aspect of the evaluation. SBMs had a great deal to say about the course. Analysis revealed that SBMs made a range of remarks about different aspects of the course. Second-stage analysis created a further dozen codes, shown in figure 4.10, which is a further refinement in our understanding. Overall there were 97 separate quotations.

Figure 4.10: Second-stage coding of CSBM course comments

## Second-stage coding of CSBM comments



The comments reported in this section are all positive. Examples are presented below for each of the main CSBM sub-codes.

The aspect which SBMs referred to most was **networking**. The following provide some examples of this:

*The building up networks, building up contacts is all beneficial for the future and for the future of schools.*

*We had really developed a support network between ourselves; instead of spending three hours trying to work out how to do something or what significance it has, you just ring your friend up.*

As one candidate commented, “I’m not on my own”; this was a feeling expressed by many SBMs. The course has clearly provided a vehicle for them to develop professional networks.

The prior experience of SBMs on the course varied considerably; those in this sample have experience of between 2 and 15 years. However, we found that SBMs commented on the **knowledge** gains they made through the course and its relevance to professional practice. This suggested that the course content had been well conceived.

*It is a very good course, in terms of the information made available and the provision of resources to do the course. These are excellent.*

*It covers so much. It really opens your eyes as to what there is there and the books that we've got are a good reference library. I've still got them at school.*



SBMs commented that the work required was “challenging” or “hard”. In our view it is important that a professional course of this nature provides a good level of demand on candidates. Some examples follow:

*It's hard work as you've got to put the work into it but no complaining and it's had a huge impact on my job.*

*In some areas I have had a steep learning curve but the health and safety side, the risk module has helped me the most.*

An interesting outcome from this data relates to **reflection**. In our visits to residential sessions, particularly those for cohort 2 as reported above, SBMs expressed concern about the amount of reflection. This data, however, presents a more positive view of this part of the learning process:

*It makes you sit and think about the way you work. I did find that quite useful although I found it very time consuming.*

*We did spend a lot of time reflecting but it does serve a purpose. It shows how you have improved afterwards and that what I didn't think I knew, I knew all the time. And you moved up each time.*

Two aspects of course delivery, the **residential sessions** and the **talk2learn** online element, received very positive feedback.

On the residential sessions:

*The residential sessions have been superb.*

*It was a very pleasant surprise. It went at a fast pace but it was all delivered.*

On talk2learn:

*I thought blended learning was really good. It linked in well together. I smiled to myself at the start of the course: I am not from a computer age but once into it I found it really good.*

*The talk2learn site, reading peoples' comments, you think, “Oh yes, I could use that and I could use this.”*

Candidates spoke very favourably about the quality of the course **resources** and they also commented positively on the quality of **tutoring**.

On resources:

*More and more I tend to be going back to the course content to have a quick look at what the course has had to offer. There are hundreds of websites linked within the course contents and I tend to be going online, getting information and then coming back to the local authority.*

*As a source of learning it's extremely good.*

On tutoring:

*Tutors, delivery fantastic, information is clear and concise, challenging and motivational.*

*The tutors I had were good, they were very accommodating, and you could go back to them if you had any problems.*

There were some areas where SBMs didn't find things quite as straightforward as they had anticipated; we coded these as 'CSBM issues'. In the overall weight of evidence contained within these interviews these are relatively small in number.

Some expressed concerns with language and jargon:

*I found the educational words – 'effectiveness' and all that – not in my everyday vocabulary, not words I use.*

The amount of work required was a concern:

*It is a heavy workload and I don't think that you are made aware of that. We looked at the list, so many hours for this, so many hours for this. I think that it might be because of the nature of the people who are doing it. You like to do the full job and everything has got to be just so. To put the portfolio together and leave no stone unturned, it is a lot more time than I initially thought.*

Quality of feedback was another concern:

*I felt that sometimes the support that you got when you handed in a piece of work perhaps was a little vague and could have been a bit more helpful maybe.*

This SBM colourfully remarked on the very different levels of demand found in some tasks:

*I do find sometimes there seems to be quite a wide range, looking at the finance [module]. On the one hand you are asked to track and order from it being placed to being paid, and that's basic but then you turn over and the next thing you think is, "How do you expect me to do this?" The breadth – some tasks are basic and some I would say are degree level.*

### 4.6.3 How SBMs see their school role and their aspirations

We asked SBMs about aspects of their career background, their present role and how they thought it might develop.

SBMs reported a range of career backgrounds, including working in a local authority for many years, serving as secretary to a director of nursing, working for a major public utility, working for a major bank, and some school secretaries who developed the role from there. The following extracts demonstrate the breadth of tasks in SBMs' current roles:

*When I started the course I had a lot on my plate at school, a lot of pressures. We had an assistant headteacher start ... and lots of movement within the senior management team. I was to take on the role of business manager, so I had several projects on the go and three new staff; this was all in January. Well, the job description isn't sorted out yet but [includes] office manager, finance SBM, premises, link to non-support staff, looking at their training and any other issues.*

*My current role in the school is site manager and SBM. I am responsible for all the finance and all the site issues, and most of the personnel issues, even though it is not recognised. My job description is 10 years old and is very much out of date, and I am not on the SMT at this moment in time although I am called in.*

We also asked SBMs about their hopes for developing their role. Some examples of their ambitions for the role are presented here:

*My role will develop in the next few years. We've just been granted specialist college status for sport; we got the confirmation letter last week.*

*I believe that there will come a time when in a school this size there will be a headteacher who looks after the curriculum and there will be a business manager who looks after the business side of this school.*

### 4.6.4 How the course helped SBMs' personal development

Having heard how varied the SBM's role is and how many of them have aspirations to develop the role, we were interested to know whether they believed the course had assisted with their personal development.

We previously reported that for a significant number of SBMs, CSBM was their first professional learning experience since leaving school, ie many of them are a special kind of adult learner and some have a more traditional idea about what they would expect from a course. Therefore interest in their perceptions of personal development represents an important outcome of the course. In these interviews we found SBMs reporting strongly about two areas: personal confidence and the related skill of making and delivering a presentation.

On confidence:

*The confidence thing again: I have found the whole course has given me more confidence. I feel more confident now, even though I have been doing the job for a while, but I am more confident now in going and arguing my point, I can put the point across with the right background and for me personally that is a great impact for the school.*

*The other thing I gained was the confidence when I'm dealing with people from outside whereas before I used to be a bit sort of timid. Now, I just say what I want.*

These comments about confidence should be read in conjunction with the outcomes from the KnoCon questionnaire, reported above (section 4.5.5.1 and appendix 4). The course has clearly enhanced SBMs' levels of confidence.

On presentation skills:

*I was absolutely terrified of standing up and talking to people. By the second session I actually managed it. I didn't like it but I didn't feel as if I was going to make a complete idiot of myself so, hopefully, come October it'll be OK.*

The presentation task is one to which SBMs frequently returned during the interviews. Clearly this has been a very important part of their professional learning and confidence building. It is a key part of the course and should not be altered.

#### 4.6.5 SBMs' relationships with their headteachers

SBMs reported mixed feelings on their relationships with their headteachers. As the data demonstrates, in some cases the head wanted to hang onto doing things as they'd always done them. Another SBM gave an example of needing to manage her head; one reported having to stand up to his head; one SBM's head had a limited view of what a SBM could offer; another didn't appear to be making full use of what the SBM could offer. Finally there was one SBM who still appeared uncertain about tackling her head about her developing role.

Some heads are described as hanging on:

*Headteachers are [from] teacher training, they should be concentrating on that [teaching and learning] but unfortunately I don't think all heads are able to let go.*

Other SBMs have realised that their heads need managing to their advantage:

*I was a bit worried because not all headteachers know exactly what their SBMs and their administrators are doing. I have got all the job descriptions, but six months ago he wouldn't have known what I was doing because I wasn't telling him what I was doing but now I do.*

Some saw that they needed to stand up to their heads:

*The head ... over the remodelling agenda we have had words over certain items that he thought he would do and I have said no you are doing it wrong and these are the reasons why, and to be fair he has come round so I couldn't grumble about that at all, so it's good. I have had words with the head and said have you any idea of what [CSBM] involves because I don't think you have. He was very adamant that he had, as he has read up on it. but. So we had words.*

This SBM's head did appear to come round to the SBM's way of thinking as this more positive comment suggests:

*"I want you working at a more strategic level, more with workforce reforms." I am starting to go out to different seminars, which always just invited the head and you shouldn't just be inviting the head as maybe in a high school it may not be appropriate. Somebody like [me] should be going out on this.*

But there are still headteachers who do not appreciate what a SBM can offer nor make full use of a SBM.

*The head, who is retiring, has been in the school for 21 years and I can see exactly where [on health and safety] he is coming from: "Oh for goodness sake. Whatever happened to common sense?" So – how can I put this tactfully? – he hasn't exactly embraced it perhaps as much as we ought to have done.*

Other SBMs do, however, report much more favourably on the ways in which their heads are seeking to support and develop the SBM role.

*She is going to promote my role and I think actually that an interesting point was that I went along to a governing body meeting.*

*I know there were some whose heads barely mentioned [CSBM] from the day they signed up whereas Jenny was extremely supportive ... this may not be the case, but my impression was that those who had recently done something like [the National Professional Qualification for Headteachers] were more supportive than those who've maybe been head for some years and it's some time since they've done any sort of qualification.*

This varied picture seems to suggest that there may still be some headteachers who either may not be fully informed of the benefits of a SBM or of the benefits to SBMs of CSBM, or have become reluctant to relinquish aspects of their role. The CSBM course might also benefit from heads being better trained to exploit the newly-found skills of SBMs.

#### 4.6.6 Impact of the course on SBMs and their schools

Our initial analysis of the full CSBM data set revealed 83 quotations relating to impact. These were then analysed separately to explore any differences in types of impact reported by SBMs. This secondary analysis yielded 113 quotations, including some interesting and important clusters. In total, 19 codes were used and of these 8 accounted for over three-quarters of the coded material. The main ones were: direct from CSBM; policies; facilities; administration; personal; services; with the head; and helping teachers. Table 4.20 presents the full list.

**Table 4.20: Categories of impact identified in CSBM interviews**

| <b>CODES</b>   | <b>Totals</b> | <b>CODES</b>         | <b>Totals</b> |
|----------------|---------------|----------------------|---------------|
| Administration | 9             | Business development | 1             |
| Case study     | 8             | Direct from CSBM     | 22            |
| Facilities     | 12            | Helping teachers     | 6             |
| Major project  | 1             | Marketing            | 1             |
| Money          | 2             | Monitoring           | 2             |
| Networking     | 1             | Personal             | 8             |
| Policies       | 15            | Recognition          | 1             |
| Remodelling    | 3             | Senior collaboration | 3             |
| Services       | 7             | Support staff        | 4             |
| With the head  | 7             | <b>Total</b>         | <b>113</b>    |

#### 4.6.6.1 Direct from CSBM

This subsection presents some examples of candidate quotations which directly attribute what they are doing in schools to CSBM. They report value and impact arising from activities undertaken, materials they've been challenged by and ways in which the course has provided opportunities to look differently at situations in school and to offer solutions.

*School development plan: in this school, I have always been invited to attend, it's been you can come if you like. I don't think that I had ever realised my part in that until I did the module that linked it.*

*I've dealt with a new cleaning contract which has gone out to tender at £50,000 p.a. doing the specification within best value. And for all of this the first modules on facilities were very helpful.*

*The case study has been really useful for me because it is something that I have implemented in the school, it's up and running now, it's support staff appraisal.*

#### 4.6.6.2 Policies

SBMs report that the course has had substantial impact upon their thinking about the need for up-to-date policies in schools. They commend the course materials both as offering good sources of policy templates and as examples:

*Everything was there [on CSBM] which we haven't got in school – and there was an incident plan – one of the first things to do.*

*Recently I am doing a lot more of the health and safety, so there has been an impact from the CSBM on that.*

#### 4.6.6.3 Facilities

One issue brought to our attention in interviews with SBMs was the extent to which SBMs were often heavily involved in facilities development or in some cases major building projects. We have examples of SBMs who suggested that they have been better enabled to tackle this aspect of their work as a result of CSBM:

*Practical examples: a facilities project – we’ve created a new reprographics room out of an old book store, I’ve done the costings, updates, new office, leasing the machinery and staffing.*

*The other thing we found was managing our own in-house building project which dealt with the refurbishment of three classrooms. It involved knocking down walls and moving them and making the rooms a lot bigger. The county’s preferred contractor quoted about £100,000. [But] it cost us in the region of £50,000 at the end of the day. It was amazingly nice, it was such a big saving ... the partitioning, they thought it was going to be £30,000 and we got three quotes for the same partitioning and ours all came between £15,000 and £17,000. For carpeting they thought £6,000. We got three quotes all roughly about £3,000 and I couldn’t believe it. And then once you’ve got [other] discrepancies, such and such ... plus 11.2 per cent [for their] management charge.*

#### 4.6.6.4 Administration

SBMs reported that they were able to make savings in the amount of time they spent on administration. In our interviews we found SBMs commenting on ways in which they were dealing with aspects of administration:

*... documents that we hold for all sorts of things, I want to bring them together so it’s easier to locate them.*

*So on the admin side it taught us SWOT analysis and I used that to great effect, it was great.*



#### 4.6.6.5 Personal

SBMs reported ways in which the CSBM impacted upon them personally as well as on their schools:

*... with the health and safety policy, I helped input with that, and then I got asked on the senior management team.*

*I am going to be involved in the PFI as well. I think the head has recognised the value of the CSBM and where it has brought me to.*

#### 4.6.6.6 Services

An important function of an SBM is to ensure the appropriate provision of services for their school. The following gives an example:

*I went along to the governing body meeting in the autumn term and the head asked me to speak about taking on in-house contractors for cleaning.*

Four SBMs reported dealing with refurbishment and improvement of toilet facilities.

#### 4.6.6.7 With the head

*One of the reasons to promote the role of [the] SBM [is that] you can relieve the headteacher so you can free up some time for them.*

*The head said to me, "Now I have found out what you are doing and what you are learning, I want you working at a more strategic level, more with workforce reforms."*

#### 4.6.6.8 Helping teachers

We found evidence in our interviews that SBMs were reporting on how their actions were helping teachers. One reported on ways in which she was providing direct support to the cross-phase liaison teacher in handling much of the paperwork for her. Another spoke of how she had led a project to refurbish a room that teaching staff could use as a dedicated work area to assist in their PPA time.

## 4.7

**Summary**

This chapter has set out the data gathered as evidence for the evaluation of the CSBM course. This evaluation has included session visits, residential session satisfaction surveys, a pre-course survey, a bespoke survey of candidates' knowledge and confidence, a post-course impact survey and in-depth interviews with SBMs in their schools.

This data forms the basis for conclusions and recommendations presented in chapter 8.