![NASBM logo] **NASBM** National Association of School Business Management

SCHOOL BUSINESS MANAGERS: THE NEGOTIATION OF PROFESSIONAL IDENTITY

Research Report
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Contents

1. Executive Summary: Key Findings

The findings indicate a considerable diversity in terms of the professional background of SBMs /with participants entering the profession via a number of different routes and having worked across a range of sectors prior to their current position. Indeed, a commonality in this respect is the lack of uniformity in relation to the career trajectory of SBMs.

Furthermore, not a single participant set out to be an SBM at the outset of their working life with many suggesting they ended up in the role by happenstance or because they found themselves at a crossroads in their career and were unsure of what to do next. This suggests that school business management is not necessarily a first career choice and that there may be work to do to raise the profile of the role as an interesting, meaningful and highly regarded vocation.

Participants discuss the qualifications and credentials they have acquired as part of their professional development as SBMs. There is perhaps more consistency here in terms of the specific school business management certification held by participants with many having acquired at least one of the SBM Diplomas. However, the extent to which such certification remains relevant and fit for purpose within an increasingly academised school system is a point of growing concern.

The range of responsibilities and duties undertaken by the SBMs in this study is wide and varied. Their remits encompass numerous areas, including the budgeting and finance; human resources; health and safety; buildings and premises; catering; management of support staff; marketing; fundraising and developing and maintaining community links. A number of participants also have support staff to assist them in their work. Indeed, in several cases the scope of the role is almost 'boundaryless', raising concerns over SBM workload and succession planning.

Perhaps as a reflection the multitude and range of responsibilities associated with the role, it would appear that the moniker of SBM is no longer universally applied to incumbents of the position. The participants in this study operate under a number of different job titles that indicate the broad scope and continued expansion of the role within the system and the means by which the professional boundaries of school business management are being stretched.

When discussing notions of professional identity and what it means to be an SBM in the English school system today, participants talk about a wide range of factors, including the multitude of professional networks to which they belong, their attempts to build credibility amongst their colleagues within the school workforce and the wider school community, and concerns over succession planning at both the school and system level. They also discuss the capacity of the SBM community to withstand and adapt to current policy shifts and their sense of responsibility in ensuring the profession survives and thrives going forward.

2. Introduction

The following report provides an account of findings from a National Association of School Business Management (NASBM) funded study undertaken in partnership with the University of Manchester to explore school business management within the English school system. More specifically, the research set out to gather knowledge relating to the composition of the School Business Manager (SBM) role and notions of professional identity amongst the individuals occupying these positions within the broader context of the burgeoning profession of school business management and both an evolving school system and a turbulent educational policy landscape. The research employed a multiple-case-study design involving 10 SBMs across a range of socio-economic, geographical and structural contexts within the English school system. Data was gathered via semi-structured interviews with each SBM to provide individual portraits of the professional practice of each participant whilst collectively constructing a detailed picture of this emerging profession.

The report outlines the context of the research project, the research design, sample, methods of data collection and analysis before exploring the key themes that emerged from the findings. All 10 case study accounts are presented in full within the appendices.

2.1 Context: School business management in England

The roots of school business management in the English state school system can be traced back to bursarship, a profession traditionally associated with the independent school sector. The bursar would have been predominantly responsible for the financial management of a school, college or university with typical candidates being ex-military personnel who often found their personnel management and organisational skills suitable for the role (Kerry, 2001). However, the origins of the modern SBM within the state school sector in England can be found in the educational reforms of the late 1980s, specifically the 1988 Education Reform Act (HMSO, 1988) and the associated Local Management of Schools (LMS) initiative that handed schools much greater autonomy and control over the management of their resources and finances. This paved the way for the emergence of specified bursarial roles, previously not seen or required, within the state school sector to accommodate this new level of responsibility. Such roles steadily became more commonplace within the school system, particularly in the secondary sector throughout the 1990s. However, in 2001, in response to a perceived crisis in the recruitment and retention of educational practitioners and leaders, the New Labour Government commissioned a large-scale research study into teacher and head teacher workloads. The findings from this study were largely confirmatory, highlighting increasingly onerous workloads for teachers and head teachers (compared to managers and professionals in other vocations), specifically the amount of administrative work that could be carried out by support staff, and a lack of bursarial support (PricewaterhouseCoopers, 2001). Subsequent independent research also supported these findings (Smithers and Robinson, 2003). The government response was an upheaval in the structure and design of the school workforce to facilitate support staff (such as secretaries, technicians, teaching assistants and bursars) taking on responsibility for more of the work traditionally done by teachers. Raising standards and tackling workload: a national agreement (DfES, 2003) was the beginning of a period of what would come to be known as workforce remodelling in which support staff roles in schools were increased and developed to accommodate more responsibility. The bursar role was central to this restructuring process. In 2001, Estelle Morris, the then Secretary of State for Education, announced that the government would fund training and professional development pathways for 1000 new school bursars over the next five years. A national programme of training for bursars and accompanying certification was subsequently rolled out by the then National College of School Leadership in a bid to facilitate recruitment and professionalise the role. This would also provide a clearer and more structured career path for what had previously been a somewhat disparate cohort of the school workforce. The title of School Business Manager was also introduced to more accurately reflect the expanding nature of a role which was no longer primarily concerned with school finances, as indicated by the more traditional title of 'bursar' (Southworth, 2010). Around this time, the first SBM competency framework was developed by NASBM, outlining the six main areas of responsibility of this emerging role. More recently, a more formal and comprehensive set of professional standards has been developed that builds on the early competency framework to underpin training and qualifications in school business management, informs the composition of the role and supports recruitment, performance management and succession planning (NASBM/CIPFA, 2015).

Over the last 15 years, the school system in England has shifted and undergone a series of significant structural changes. Modern schools are complex organisations offering services and provision far beyond the traditional model of schooling. They have sizeable budgets and are increasingly working in partnership with other schools and agencies. Furthermore, widespread academisation and the associated decline of the local authority are symptomatic of a shift towards what has been termed a 'school-led system' (Hargreaves, 2010; 2012). Consequently, business and organisational acumen form key components in the school principal's armoury. Against this backdrop, the role of the SBM has evolved as a key position in schools as they adapt to a fast-moving landscape necessitating business and organisational management capacity at leadership level (Woods, 2014). Moreover, with the recent government White Paper Educational Excellence Everywhere (DfE, 2016) outlining plans to ensure every state school converts to academy status by 2022 with the expectation that schools will increasingly operate in formal collaborative arrangements under the multi-academy trust (MAT) model favoured by the current government, it seems certain that the SBM role will become more central to the school system going forward. Today it is estimated that around 90% of secondary schools and 40% of primary schools have access to an SBM (the lower figure in the primary sector reflects the smaller budgetary, resource and organisational requirements of schools in this sector). The individuals occupying these roles are situated in a unique position in the school. Though generally classed as support staff, SBMs are often members of the school leadership team with considerable influence and decision-making responsibility over financial and organisational matters. As such they can been be seen as occupying multiple group memberships (Armstrong, 2014). Yet, despite their strong representation and the increasingly vital role played by SBMs within the system, school business management remains an under-researched area with SBMs having received very little scholarly attention in comparison to other educational stakeholders.

The purpose of this project is therefore to address this gap in the knowledge base by exploring the composition of the contemporary SBM role in the English school system today. The research will also consider how these individuals have forged their professional identities and how they see themselves and their emerging profession within the wider school system.

2.2 Aims of the project

The research aims to explore the experiences of SBMs as a group of 'outsiders', negotiating their own territory within a landscape traditionally led and managed by trained educationalists. Of particular interest are notions of self-perception (how the SBMs see themselves as professionals) and inter-group relations (how the SBMs see themselves in relation to the other groups alongside which they work) and the implications of these issues within the wider contexts of their own burgeoning profession and a turbulent policy landscape.

3. Project Design and Methods

3.1 Design

A multiple-case-study approach was adopted to explore the professional practice of the participating SBMs with the 'case' constituting the individual SBM (see table 1). This approach facilitated an in-depth exploration and meaningful understanding of the historical narratives, working lives and professional identities of the participants and the educational contexts within which each one operates. The research was designed in line with case study research suggested by Stake (2000) whereby information was gathered on the nature, historical background and structural, socio-economic and geographical context of each case with multiple cases drawn upon to capture variation within the sample and further develop understanding around the key issues and emergent themes.

3.2 Sample

Participants were identified, approached and recruited via a combination of email invitation and advertisement. Email invitations to participate in the study were sent out to a list of SBMs across the country with whom the researcher had previously worked. In addition, NASBM placed an advert for the project on their website and a flyer (also advertising the project and inviting participation) in the welcome pack for delegates at their annual conference in November 2015. The response to these invites and advertisements was very positive with 32 SBMs from across the country volunteering to participate in the study. From this larger sample, a final sample of 10 SBMs was selected. This number was decided upon based on the need to generate a sample that would be large enough to reflect a range of socio-economic, geographical and structural contexts and different phases of education in order to capture wide variations in the SBM role. Given the case study design of the research (and accounting for researcher capacity and resource), it was felt that this number of participants would be sufficient and allow the development of 10 rich cases of SBMs in practice across a range of different settings and contexts that would encapsulate the breadth, depth and diversity of the role.

Table 1: Case study descriptors and context

Case study ID	Phase	Type	Locale
A	Cross-phase	Independent	Suburban
B	Primary	Maintained	Inner city
C	Secondary	Academy	Rural
D	Primary	Academy	Suburban
E	Secondary	Academy	Urban
F	Primary	Maintained	Suburban
G	Secondary	Maintained	Suburban
H	Primary	Maintained	Suburban
I	Secondary	Academy	Suburban
J	Secondary	Grammar	Suburban

3.3 Data collection

Data was gathered via a 60-minute interview with each of the 10 participating SBMs. The interview schedule was designed to explore and elicit information relating to the following three areas:

- Professional narrative: including details of professional background and career trajectory and the route they have taken to their current position.
- Current role: covering the composition of the SBM role, their position within the broader leadership and management structure and the extent to which they believe their role is understood and appreciated within their setting.
- Professional identity: including the self-perception of the SBM and how they believe they are perceived by other staff members, building credibility, challenges to identity and perceptions on the broader profession of school business management in the current school system.

Interviews were semi-structured to provide an optimal combination of flexibility and ability to adapt to the flow of the interview, while staying firmly within the parameters and aims of the study.

3.4 Data analysis

All interviews were fully transcribed then subjected to a thematic analysis (Miles and Huberman, 1994) whereby the key issues and patterns within the data were identified systematically through a processing of multi-level coding. The interview questions were used as an overarching frame against which higher-level codes were developed and mapped. The transcripts were then read carefully and relevant sections of text labelled with the corresponding codes before being subjected to further scrutiny to isolate additional meaningful sub-themes. These sub-themes were also labelled with lower-level codes. This analytical process allowed the identification of central themes within the data as they related to and addressed the overarching aims of the research.

In addition, the data from the 10 interview transcripts was developed into a case study account which was then sent to each participant to check their 'case' provided a truthful and fair representation of their professional history and practice. Their comments and suggested amendments were addressed to ensure the accuracy of each of the case study accounts. All 10 case study accounts can be found in the final section of this report.

PROJECT DESIGN
AND METHODS

4. Findings: Key Themes

4.1 Overview

This section describes and discusses the key themes that have emanated, including the professional narratives of the participating SBMs and their qualifications and credentials; the composition of their respective roles and the breadth and depth of their responsibilities; and issues relating to the development and sustainment of their professional identity, including professional networks, building credibility, succession planning, the influence of policy shifts and individual responsibility for the profession and its future.

4.2 Professional narratives

The findings indicate a wide diversity in terms of the professional background of SBMs with participants entering the profession via a number of different routes. Indeed, a common theme in this respect is perhaps the lack of uniformity in relation to the career trajectory of SBMs. Furthermore, not a single participant set out to be an SBM at the outset of their working life. Participants also discuss the qualifications and credentials they have acquired as part of their professional development as SBMs. There is perhaps more consistency here in terms of the specific school business management certification held by participants. However, the extent to which such certification remains relevant and fit for purpose within an increasingly academised school system is a point of growing concern.

4.2.1 Career trajectories

Participating SBMs have entered the profession via a range of different routes, including backgrounds in educational support, accountancy, banking, insurance, recruitment, higher education, local government, retail, police, armed forces and public house management amongst those cited. While this rich diversity of pathways suggests a certain randomness and inconsistency in terms of the means by which SBMs careers have developed, there are some common threads running through the accounts of the career trajectories given by participants. For example, organisational management skills are repeatedly highlighted in the interviews as an area of expertise that has both positioned participants for and served them well within the role, as this individual explains: *"I liked organisation and I seemed to have a plethora of different skills, whether they were marketing, finance, income generation, project management and it all just fitted together and I ended up in a school as a business manager."* This participant offered a comparable explanation as to why his skill set was suitable for his current SBM position:

The job I was doing in the council, I was like an operational manager as well as doing strategy stuff, so I did finance and HR so … I had a really mixed bag and … I just felt it was a good fit for my background.

Linked to this is the broad range of skills and experience that SBMs have brought to their roles, developed via a diversity of previous occupations, often across different sectors, and that they have found to be transferable to the organisational management of a school. As this SBM describes:

On reflection I think 'well, actually where did I pick up those skills from? Was I ever taught them?' And I suppose it just happened along the way … I just kind of saw it advertised and thought well I've got knowledge of information systems, I've got knowledge of HR, finance, I've got knowledge of kind of food and dining and obviously my degree I had knowledge of premises and landscaping and things.

Likewise, this SBM reflects on her previous position and the transferability of her skills and knowledge into her current SBM role, describing how: *"it covered quite a large degree of the same areas of responsibility that I cover in school, so basically … financial management, administration, HR management and estate management and so the skill set that I had from working with the police was similar to the skill set that [was] required of me in a school."* Indeed, the notion of the SBM as a 'jack of all trades' with a broad range of competencies and a diverse skill set is one that emerges repeatedly amongst participants who describe a role that is almost without boundaries in terms of responsibility. This is discussed further in the following section but is worth highlighting here as it goes some way to explaining the rich and varied career trajectories of the SBMs in this study.

Another commonality in relation to the career trajectories of participants, and one that is also linked to the previous point regarding diversity of professional background, is the idea that school business management is not necessarily a vocation that

individuals aspire to. Indeed, the consensus amongst the participants suggests that many incumbents of the role have ended up working as SBMs by chance, as this participant asserts: *"I've been a business manager since 2000 and … really I came into the profession by accident."* Similarly, it seems a combination of circumstance and opportunity, rather than a pre-planned career option, explains why many of the participants initially entered the profession:

I was thinking 'right, now's the time to get back and I'm not really sure what I want to do' but just flicking through adverts saw a role as school business manager advertised … and when I looked at the job description, lots of it was based around skill sets and experiences that I'd had in my previous roles, so … the two seemed quite a natural fit.

This SBM reflects on a comparable situation, in which their current SBM position was one that they stumbled across at a crossroads in their career when they were unsure of exactly what they wanted to do next, as they explain when asked how they came to be in their current post: *"I don't really know! I started out doing insurance but, with all the mergers, I ended up coming out of that, went to a loss adjusting company, again mergers so … initially I went to the council for 5 years, got bored … I'd been mentoring in a local school and a job came up in a school nearby where I lived, part-time, so I went for that and I got that one."*

These accounts suggest there may be work to do to raise the profile of the profession as a viable first career option rather than a role that individuals fall into by happenstance or because they cannot decide on the vocational path they would like to tread. A broader understanding of the diversity of responsibility and the level of influence and financial and organisational management associated with the SBM role would potentially facilitate this and would be particularly welcome outside of the school sector where the role remains relatively unknown.

4.2.2 Qualifications

In addition to the vast array of knowledge and experience that they bring to their respective roles, the participating SBMs are also a highly qualified cohort. Almost all participants have completed at least one of the recognised SBM programmes originally developed by the National College (Certificate/Diploma/Advanced Diploma in School Business Management and the School Business Director Programme). Others have completed school-business-management-specific courses in higher education and others still have undergraduate and master's degrees from related disciplines. Others still have completed specialist financial and accountancy qualifications (e.g. Certificate in Financial Reporting for Academies through CIPFA). In many cases, these qualifications have been undertaken in-service as part of a programme of professional development, as this SBM explains: *"I completed the CSBM … that led me to a little bit of promotion in school where I became the office manager, I did my DSBM, extra responsibility and then I had the opportunity to do the ADSBM or Teesside were offering a tailored degree in Business Management for SBMs, so I did my degree with them … and was appointed to the leadership team."* The participants also highlighted the importance of such training and credentials in their field as a means of building both confidence in themselves and credibility amongst their colleagues:

When I joined my previous school one of the conditions that they said to me … at interview if I was to be offered, was would I be willing to undertake the CSBM to which I was … but I suppose that gave me a little bit of professional pride and actually it almost said 'I've got something to show, I have been trained in this field now.'

This notion of professional pride and recognition is important for SBMs and the growth and establishment of their burgeoning profession particularly in a school sector that has traditionally been led and managed by trained teachers. This SBM describes her experience:

I've got to say when I first came to work in education that I felt that educationalists believed they were the only professional people on earth! But it's about building up respect and credibility isn't it? And then actually when people learn that … 'OK, you need to have a qualification for what you do or actually, no you need to have several qualifications for what I do and yeah, I do have a Master's degree and yeah, I do have an accountancy qualification … in fact I probably spent more time in university and colleges than you did to get your teaching, your teaching qualification!'

1. Chartered Institute of Public Finance and Accountancy (CIPFA), an organisation that has advocated for school business management and, in collaboration with NASBM, developed the recently published SBM professional standards (NASBM/CIPFA, 2015).

However, an issue that was raised amongst more than one of the participants in the research is the continued usefulness and relevance, perceived or otherwise, of the SBM-specific certification (now known as the Level 4, 5 and 6 Diplomas in School Business Management.) While it is the experience of the participants that SBM job advertisements still consistently require one or more of these diplomas, there is a growing concern that accountancy qualifications are increasingly required for the job, particularly within academies. This issue has become acute since the intensification of the academies programme, as this SBM explains: *"I mean now everything's going to academies, a lot of the time they're asking for accountants or people with qualified accountancy things, so … in one respect if I was to move on I would probably find it quite difficult because I haven't got that qualification."* This has created frustration and anxiety amongst SBMs that their qualifications might be no longer fit for purpose and rendered obsolete in a school system that is changing too fast for the profession to keep pace with:

When I came into this job it was all pushing the school business management qualifications, so I'm working my way through them, I'm at ADSBM level at the moment … but then when I finish that I'm going to have to now revisit doing accountancy because it's becoming more and more obvious that that's something you're going to need.

The participants in this study are clearly committed to professional development and have the credentials to support this commitment, but there is a certain level of uncertainty regarding the applicability of the current suite of SBM diplomas to the current school system and the direction in which it appears to be headed. These concerns suggest there is work to be done to ensure the SBM diplomas remain relevant both for current practice and going forward within the context of a rapidly changing school system in which spaces are being created for professionals with specific and specialised skills in finance and accountancy in addition to the school-based knowledge that SBMs bring to the role. Indeed, a dialogue surrounding the strategic direction of the professional pathway for SBMs between school leader, governing body, local government and MAT representatives, as the key stakeholders involved in the recruitment of SBMs, might offer a potentially constructive way forward here.

4.3 Role composition

The range of responsibility and duties undertaken by the SBMs in this study is wide and varied. Their responsibilities cover numerous areas, including the school budget/finance; human resources; health and safety; buildings and premises; catering; management of support staff; marketing; fundraising and developing and maintaining community links. A number of the participants have support staff to assist them in their work. Generally speaking, much of the responsibility associated with the SBM role can be described as organisational and resource management and is fairly typical of what might be expected of a modern-day SBM in the school system in England. As this SBM explains, the role often also includes dealing with very basic operational issues:

If there is a blocked drain and the supervisor isn't on site … that will be me. If there's an ICT … issue and the ICT technician isn't here I will go and sort that out, but that's just day to day, I'm the person that they would come to for that sort of thing, but my actual role encompasses the full gambit really of business management in schools. I am finance, I am HR, I am premises …

This is a commonality across the sample, where the SBM is almost viewed as the chief problem solver in the school and the individual to whom people turn when they encounter an issue they cannot resolve that is not directly related to teaching and learning. Given the size and scale of the operation within even the smallest of schools and the growing volume of organisational responsibility and management associated with the decline of the local authority in England, there is a growing sense that the SBM role has almost become 'boundaryless' in its composition. According to this SBM: *"the actual duties of my job are constantly evolving … every day is different, you can't predict what you're going to be asked to do any more."* Similarly, this participant suggests considerable disparity across the system in terms of SBM role composition, an issue intensified by the current policy landscape:

There was always such a difference in role and what people were doing and then on top of that, you had the change with academies … so … it's hard to say there's one identity of what is a business manager because we're all doing different roles, we're all doing different things.

Perhaps it is the wide range of different areas that the role can encompass that has created the conditions whereby many SBMs feel they inhabit a position with an almost limitless remit. In addition, a number of the participants in this study describe how they have constructed and moulded their role over time, as they themselves have developed professionally and gradually taken on more responsibility across different aspects of the school. As this SBM explains: *"when I left my last school and came here, I had to give two months' notice and the head teacher said … 'can you write down everything you do?' No! a) Why should I? You know, I've kind of gathered that knowledge over the years and b) it would take me forever, I just couldn't do it."*

It is also important to note other important factors that contribute to the composition of the role. For instance, the size and associated organisational capacity of the school has a considerable influence on the breadth and depth of the SBM role with secondary SBMs tending to have a wider remit than their primary counterparts. Similarly, some of the SBMs are working across more than one school (for example if their school is part of a collaborative arrangement such as a federation or multi-academy trust). Those participants working in academy schools tend to have a different role to their peers in maintained schools, mostly because of the organisational autonomy that academy schools are granted in terms of finances, resources and provision of services, as this SBM explains:

The job is totally different whether you're in an academy [or] not an academy. When you're not an academy you've got the backing of the local authority the whole time so they're practically doing your finances for you, they're checking it, you're just sending in a monitoring report. When you become an academy you are the company secretary, you are holding the reins of multi-million pounds of funding and you are doing the management accounts. You're running a business in effect.

Interestingly, the experience of another participant who is also working in an academy school, albeit as part of a larger multi-academy trust, is very different to the previous example. Here she explains how her role has changed since the school converted and joined the trust:

I think we've got less autonomy now, and I don't know whether this is a geographical thing or just the way the chief execs and some of the directors in the MAT work, but the communication … seems to be more one-way than two-way … I don't feel as though I've got a voice as part of the trust where I did feel quite comfortable and confident in challenging the local authority … or bringing things forward to the local authority, I don't quite feel the same now.

Furthermore, the relative decline of the local authority in some areas of the country has meant that maintained schools in these areas are often operating largely outside of local government control in terms of buying in services. As such, some of the SBMs in maintained schools are operating in similar ways to those working in academies. It would appear, therefore, that the landscape is quite complex and, despite the views of some participants, the SBM role is not always easily distinguishable between those working in academies and those who are not. As the school system in England shifts towards a more academised model, as current policy indications suggest it will, we might expect the SBM function to continue to diversify and grow with implications for what is already a multi-faceted role.

4.3.1 Role title

Perhaps as a reflection the multitude and range of responsibilities associated with the role, it would appear that the moniker of SBM is no longer universally applied to incumbents of the position. Indeed, the relatively small number of participants in this study operate under a number of different job titles, including *School Business Manager; Bursar; Director of Business and Finance, Business Director; Development Director for School Business and Finance and Strategic Director - Operations*. Such titles are not mere labels but clear indications of the broad scope and continued expansion of the role within the system and the means by which the professional boundaries of school business management are being stretched. Indeed, the collective nature of the SBM title has not always been helpful, as this participant contends: '*I bump into people who tell me they're an SBM and I'm thinking "but you do something totally different to me!" So in some respects, it can belittle what people expect an SBM to be.*' The titles attached to the role are therefore an important means by which to gauge the ways in which the profession is evolving, fragmenting (see 4.4.4) and adapting to the structural shifts within the school system that are transferring more financial accountability and organisational management responsibility from local government to school level. The professional spaces emerging as a result of these shifts are increasingly occupied by individuals from other sectors (see 4.4.3), yet this also presents opportunities for existing SBMs to develop their skills and knowledge and engineer a job title that accurately reflects the work they do.

4.4 Professional identity

When discussing notions of professional identity and what it means to be an SBM in the English school system today, participants talk about a wide range of factors, including the multitude of professional networks to which they belong, their attempts to build credibility amongst their colleagues within the school workforce and the wider school community, succession planning and the next generation of SBMs. They also discuss the capacity of the SBM community to withstand and adapt to current policy shifts and their sense of responsibility in ensuring the profession survives and thrives going forward.

Underpinning these issues, however, and a key message reiterated by the participants in this study, is the pride they take in their practice, their commitment to their role and an acknowledgement and awareness of the importance of the work they do in their respective schools. This SBM who is retiring shortly describes a recent conversation with her head teacher:

I brought the professional standards and said 'look, this is what you need to be looking at' and the principal's read them … and in actual fact she's said to me we need two people to replace you … But I think they do, certainly she does recognise and the chair of governors, they recognise how critical it is to get the right person for this role because, you know, as a business with an £8million turnover … you know, you've got to make sure you've got somebody who knows how to deal with the numbers haven't you?

Similarly, this individual highlights the long hours he spends at work and his dedication to his job as a key feature of professional practice: *"I do see it as a professional role. And I see it as a professional role … within the school and one of the things when you're a professional is you don't observe official hours of work, for example … you work the hours you need to work to get the job done and you work out what job needs doing."* It is important to foreground the devotion to the profession felt by many SBMs for whom the job is much more than an exercise in organisational and financial management but rather a crucial role improving the educational experience and outcomes of the young people who attend the schools in which they operate.

4.4.1 Professional networks

Many participants draw attention to the growing professional community of SBMs to which they feel a sense of belonging and, more importantly, consult regularly for guidance and reassurance in their roles while also offering support to other SBMs when required. A number of those interviewed spoke of local, regional and national networks of SBMs with which they meet regularly and maintain a rapport through email, online forums and phone calls. They very much perceive such professional dialogue and support amongst their peers as a key feature of what it means to belong to a profession. Some of the participants are actively involved in the organisation of such networks, including chairing or coordinating the groups, recruiting new members and arranging conferences and workshops.

Moreover, there is a strong sense of responsibility amongst the participants towards supporting their peers and working across the boundaries of their individual schools and settings, as this individual explains: *"I'm thinking this could be the career that I stay in for the rest of my life and I do feel I could contribute to this as a profession and help other schools. It's like I've invited primary school business managers if they want to come here for meetings, that's something I do think I can add and help promote it really and raise the profile a bit."* This is consistent with a wider SBM community that one participant described as 'very supportive and friendly'. Given the often isolated and lonely nature of the role, it is important that professional networks give incumbents a sense of professional belonging in addition to important sources of support and guidance. As this participant explains when discussing her SBM network meetings: *"people really value being able to talk to their peers and we might come up with a discussion topic and say "talk to each other about how you do this" and they just have table top discussions and, you know, that's really useful for them."*

4.4.2 Credibility

The notion of professional credibility is a common discussion point amongst the participants, who talk candidly about the means by which they have gained the respect of their colleagues and developed a wider understanding of their role within their schools and the communities they serve. For instance, this individual explains how she has actively led by example in offering her support to fellow staff members: *"I wouldn't ask anybody to do anything unless I was prepared to do it myself and I think I'm probably quite visible in that from the ground up. I would turn my hand to anything and try and help anybody with anything or find out for them."* This visibility also extends to the wider community with which she has developed links, not only to raise her own profile but to ease workload on senior leaders: *"I thought if I could get to know the community and they knew me and knew that I was the sort of person that they could come and speak to or ask then actually, anything that I can do that promotes or releases teaching time or takes the flak off what's going on, because I think it's always been for me really important."* Other participants concur, highlighting their approach to the role as being crucial to how they are perceived:

I think a lot of the professionalism has got to be in how you conduct yourself, so if you display leadership qualities and you act in a professional manner with complete integrity then that certainly helps in the recognition of you being a professional.

Another important factor is the status of the position and the level of leadership and management responsibility associated with the SBM role. Whilst all participants in this study are members of their school leadership teams, how the role is perceived by the head teacher and governing body often dictates the level of decision-making responsibility and influence the SBM has. This also raises notions of trust and professional support which, in turn, facilitates recognition and credibility, as this individual explains:

FINDINGS: KEY THEMES

I was helped in a way because the head teacher who was previously here … gave me a lot of autonomy … for things like budget, bringing changes in with technology and the premises … which helped a lot and he did put that trust in me … and I think as a result of that staff saw that those were the things I was doing … I think that gave more appreciation and recognition of what I was doing as a professional, as a school business manager.

This participant shares similar sentiments: "*the perception is still very, very different in every school you go in. And that is often the head teacher that formulates that … the head teacher here treats me very much like a deputy head, where … I've been to other schools, I go and coach other business managers and … a couple of them I go to don't have a lot of contact with the head teacher at all.*"

The SBM professional standards are repeatedly highlighted as a key facilitator to the growth and establishment of school business management as a recognised profession and a means of creating more coherent professional boundaries within a role that is often perceived as limitless in scope, as this participant asserts: "*it's always going to be a challenge really … because you can't create a box that the role fits into and I think professional standards are definitely a way down of getting to that point because if the unions get on board, then that should filter down through the union so teachers would understand the role a little bit more as well.*" This recently retired participant agrees, recalling the instance when she presented the standards to her head teacher during a discussion about her successor: "*she's [head teacher] read those and thought, 'you know, that's what we need to be looking at' and has accepted that it is a profession and in actual fact she's said to me 'we need two people to replace you!'*"

Yet despite the undoubted progress within the profession over the last 20 years in terms of professional credibility, there remains an underlying disappointment that the role is not universally recognised, as this individual explains: "I'm still not sure it's taken that seriously … *I'm still not sure it is, even with the professional qualifications, you know, ADSBM and all those sorts of things.*" For instance, a number of participants point to the professional space and lack of collaboration between teaching and non-teaching staff in schools; something that is not necessarily conducive to a productive and healthy organisational culture. Reflecting on her previous post, this SBM explains how: "*it was one of the reasons I left actually … nobody told me anything … I wasn't involved and it was very much an us and them because you know, you have the teaching staff and you have the teaching assistants which are part of that and then there was me, do you know what I mean? And I got more and more isolated … it wasn't a nice situation.*" Another participant suggests the role is still not fully understood outside of the school system:

[What] *I have found is that this tends to be a role that people do fall into, almost by accident, rather than something that people aspire to or leave school thinking this is the sort of profession they want to go into. And I guess there are a number of reasons for that … some are the nature of the job where it is a bit of a catch-all position, isn't it? You know, it's a lot of different things but also I guess because that might also be to do with the fact that the profession is still growing in status.*

This relates to the earlier discussion regarding the means by which individuals enter school business management and the idea that more could be done to publicise and raise the profile of the profession to raise awareness and understanding, both within and beyond the school sector, of the scope and importance of the SBM role.

4.4.3 Succession planning

The issue of succession planning is a common discussion point for participants both at the school and system level. Within their individual settings, many of the SBMs interviewed highlighted the lack of adequate planning for a successor to their role and pointed to a number of reasons for this. Firstly, as highlighted earlier, the role is so broad in many schools, encompassing such a range of responsibilities that formulating an accurate job description is often a challenging task for head teachers and governors. Indeed, a number of SBMs in this study suggested they would find it difficult to accurately record the extent of their remit. In addition, many schools simply do not have the capacity and resources to develop aspiring SBMs, as this individual contends: "*if I was knocked down by a bus tomorrow, there'd be lots of things that wouldn't get done and no one in school would kind of know how to do some of the stuff … we haven't got that succession planning and part of that is because of the time and the staffing that we've got, we don't have the time to train up people in all the different aspects.*"

It is important to note that this is not the situation in all schools. Some participants have teams of support staff working under their line management and within which there is an aspiring SBM whom they are training up to potentially succeed them or find an SBM position elsewhere. However, the general consensus amongst the SBMs in this study, even those with succession

plans in place for their own role, is that the future of the profession in its current form is facing a significant challenge given the ageing demographic of the SBM community and the growing influx of individuals from outside of education into the professional space inhabited by SBMs, as this participant suggests:

When I look around meetings now and conferences, there are more of us getting to the 50 plus age! The ones who I know who are at the top of the game and really working, we're not getting younger … my concern is the profession isn't developing future business managers, it's developing future specialists who are now seeing the opportunity to move from industry or commercial sectors into education.

She goes on to suggest that this combination of an ageing profession, no natural pipeline for succession and the influx of the specialists from other sectors will lead to the knowledge within the system being lost: *"the qualifications are no longer fit for purpose, a lot of the current SBMs have grown over the years by developing a wealth of skills and knowledge and I think that is going to be sadly missed."* A fellow SBM believes one solution might be to adapt job titles to reflect the disparity of roles and the different levels at which SBMs are operating within the system and facilitate an influx of aspiring SBMs: *"you could use a professional standard say 'trainee business manager' and then you could start them with admin tasks, train them up in the different offices and then get them up to a deputy SBM over the course of the years."*

4.4.4 Structural reform

The structural reforms that the school system in England has undergone over the last decade, particularly the academy programme and the decline of the local authority, have had significant implications for the means by which schools are resourced and managed both organisationally and financially. The SBM function is positioned at the vanguard of these changes and as such the profession has been impacted profoundly. This issue cuts across the notion of role composition as discussed earlier in the sense that those SBMs operating in academies are likely to have much more financial and organisational management responsibility working in a school that is no longer maintained by the local authority (see 4.3).

However, in addition to this, a number of participants raised concerns regarding what they believe to be a potential (further) fragmentation of the profession as academies increasingly seek to employ qualified accountants and financial experts to manage their not insignificant budgets such is the increased financial accountability on head teachers and governing bodies of these schools. As highlighted earlier, many SBMs are anxious that the role-specific qualifications they have acquired are no longer relevant, which, as this participant explains: *"is quite frustrating because when I came into this job it was all about undertaking study of the SBM qualifications, so I've worked my way through them, I'm at ADSBM level at the moment but then when I finish that I'm going to have to now revisit doing accountancy because it's becoming more and more obvious that that's something you're going to need … I keep doing exam after exam after exam and then the goalposts get moved."*

There is also suggestion that as the school system, and academies and MATs in particular, move towards more corporate structures in terms of leadership, management and staffing, the profession will splinter so that there is less of a requirement for a single SBM role as the school business management function grows:

You go to other academies, they've got finance directors who are finance-driven and they're not doing the premises and they're not doing the other side of it … so in one way it's professionalised [the] profession because we are being recognised, you can't go to an academy that hasn't got somebody in this sort of a function … but within that it's becoming more fragmented as people specialise in different areas, rather than being able to do everything because it's a big job.

Others raise concerns that the traditional SBM role may even be at risk if the school system becomes completely academised, a process that may well come to pass given the current government's education policy that is advocating for more schools to convert, as this individual explains: *"they're pushing for academies for everybody now and they're not happy now with single academies, they want you to be a multi-academy trust and they were talking about having a CEO at the top of it rather than a head teacher and so where does our role come into that you know?"*

However, a key strength of the SBM community and one that has always underpinned the profession is their school-based experience. As this participant asserts, this collective knowledge should not be overlooked:

Several of the business managers I've been coaching have come in from business, not from school background … now I'm not totally convinced that works. I can understand the rationale behind it, I can understand they want someone with business acumen to come in and maybe in a secondary school it works because there is much more a structure of a corporate business … you know, you've got the people underneath you to do the operational stuff. But in a primary school … you literally have to know how to do everything yourself and you can't rely on other people.

Many of the participants interviewed agreed that having an understanding of the idiosyncrasies and nuances of the school system was vital to the role. Indeed, for those participants who had entered the profession from others, developing their understanding of the means by which schools are organised and operate was hugely important but a process that took time and patience. In the current policy climate in which academies and multi-academy trusts (MATs) are increasingly looking to recruit individuals with specialist finance and accountancy skills often from outside of the sector, the value of such school-based experience and knowledge is in danger of being overlooked.

4.4.5 Responsibility to profession

This final theme is an issue that interlinks with many of the previous discussion points, particularly discussions surrounding the positioning of the profession within the school system in the future and the actions that SBMs might need to take, both individually and collectively, to ensure they remain at the forefront of the financial and organisational management of schools going forward. When asked about their perceptions of the role and the wider profession, many of the SBMs interviewed drew attention to the policy shifts and structural reforms that have characterised the school system in recent years and have had considerable influence on the role in terms of increased responsibility and accountability (see 4.3 and 4.4.4). Whilst this has undoubtedly been a challenge for members of the profession, a number of participants claimed such changes had also provided opportunities for SBMs to develop their skills and knowledge. Indeed, as this individual contends, the very nature of school business management requires such a proactive mindset:

You can't say that you don't know something - if you don't know something then you either need to go on training or find the answer, that's how it works. That is how I've got the knowledge in this job because it is thinking on your feet a lot of it.

Moreover, as this participant explains, SBMs have a duty and responsibility to their profession to regularly maintain and re-evaluate their knowledge and skills to keep pace with educational policy changes and to ensure their role remains essential within the school system:

Everything changes when you become an academy. Now I'd seen it coming and I've seized the opportunities by watching, you know, national agendas and what's happening so I'd already started doing my accounting qualification … you can't work in an academy without some financial background or qualification … it took me 3 years to get my MAAT, you know and a lot of money, I paid for it myself. So it was a big commitment.

As highlighted earlier, a key strength of the SBM community is their deep knowledge of the school sector and the means by which it operates politically and organisationally. As the school system increasingly adopts practices and structures more synonymous with the corporate world, the temptation to recruit individuals from this sector is clearly strong and provides a challenge for the members of the SBM community who risk being left behind. Yet this scenario also poses risks for the system with the potential loss of the school-based knowledge and experience that many SBMs have accumulated throughout their careers. The importance of this to effective functioning of the school sector ought not be underestimated. The findings from this research would suggest that the SBMs adapting best to these circumstances are those who have kept pace with policy by strategically developing their skills and qualifications and showing the dynamism and initiative required within a turbulent sector and an ever-changing role, as this participant suggests: *"some people just want to go into work and do the same thing and know what they're doing and this isn't a job like that."*

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Appendices

Appendix 1: Crossley School

Context

Participant A is the School Business Manager at Crossley School, a larger-than-average primary school in the northwest of England that serves a relatively affluent catchment area of students of predominantly white British heritage. The proportion of pupils eligible for pupil premium funding and those with a statement of special educational need is also below the national average. Following their last Ofsted inspection in 2014, the school was deemed outstanding.

There is tremendous teamwork among the staff. Senior and middle leaders, teachers and support staff, are equally determined that all pupils will do as well as they possibly can.
(Ofsted, 2014, p. 1)

The school is a member and strategic partner of a Teaching School Alliance in the region along with a local sixth-form college, secondary academy and a nearby primary academy. More recently, Crossley School was awarded Teaching School status in its own right.

Professional background

Participant A began her career in the accountancy sector working for a small company of insolvency practitioners before moving across into the legal sector to become practice manager of a firm of solicitors. After taking a career break to start a family, she returned to work on a casual basis at her children's school where she realised her skill set might be transferable to school management. It was during this time that the National College was developing the professionalisation project for school business management and the role was growing in profile nationally with advertisements for new posts appearing more regularly. She applied for a couple of positions and was able to secure a post in the primary school sector under a forward-thinking leadership team that provided the space for her to develop professionally:

The head and the deputy at the time were very open-minded and said that, you know, it wasn't a business manager's role, it was the finance administrator's role, but they were willing to support me through the qualifications … So that was great and I came here … eight years ago as … as the financial administrator for the school and very, very quickly built that role up, made it my own.

She has remained at this same school ever since developing the role and her own skill set in tandem, successfully completing the CSBM and DSBM and, more recently, a BA in Business Management in Schools. She has also moved from the role of finance officer to office manager and now SBM and is a member of the senior leadership team at the school.

Role composition and responsibility

Her role is typically broad, encompassing a range of different areas of responsibility, including finance, human resources, premises, extended services (including the breakfast and after-school clubs) and chairing governors' meetings. She is also on call to deal with other issues should they arise: 'if there is a blocked drain and the supervisor isn't on site … that will be me. If there's an ICT … issue and the ICT technician isn't here I will go and sort that out … day to day I'm the person that they would come to for that sort of thing.' The school have recently recruited an apprentice SBM to support her in the role and build capacity in this area whilst they also buy in some financial services from the local authority as an additional layer of checks and balances to reconcile the school's main budget on a monthly basis. Conversely, the school have removed themselves from the local authority's property services to allow themselves more flexibility when employing contractors for buildings and maintenance. They have also opted out of the local authority catering services which has brought about a number of additional benefits:

We run and own our own school kitchen so we don't have the local authority catering services and we don't have private contractors. Our kitchen staff are employed by the school … they cook to order each day so when the children come in in the morning, they take the register and then they will order their lunch so there's three or four options each day, they'll order it, the menus go through to the office, the office calculate the numbers, they get through to the kitchen and they cook to order, so that reduces waste.

Indeed, such has been the increase in students buying their lunch from the school canteen, they have been able to spend £25,000 on a brand-new kitchen funded entirely from the money they have generated. This project was managed by the SBM.

As part of the partnership work with the teaching school alliance, participant A has been appointed as a Specialist Leader of Education (SLE), specialising in school business management, and has developed a programme of professional development for local SBMs and other organisational support staff in the area. Together with another SBM and Finance Director from two nearby academies, she has delivered training programmes to all the schools in the alliance via twilight sessions. However, the low attendances at these sessions have proved frustrating, something participant A believes could be addressed if they were to deliver certified SBM qualifications rather than individual bespoke modules. For this reason, she believes it would be a more constructive use of her time and knowledge to train colleagues in-school as a means of capacity building: 'I'm more determined where I want to bring people in here that I can train in-house, one to one and go through that journey with them.' This commitment to capacity building is not restricted to the school but also motivated by her dedication to supporting aspiring SBMs within the broader system - what she sees as her 'due diligence' toward the profession.

Professional identity

The notion of professional identity and how participant A is perceived in her role has shifted over time as she has developed professionally, moving through the ranks from finance officer to SBM and raising her profile amongst colleagues along the way, particularly her transition on to the senior leadership team:

When I first went on to the SLT and I got this business management title, there was a lot of people who probably didn't understand the role and a misconception of that, but my colleagues on the SLT, we are a very, very tight group and support each other and I have been able to offer a lot of support in different areas over the last couple of years … so I feel now that I am appreciated and I am seen equally as important within that group.

The support of the head teacher has also been crucial in raising and maintaining her professional profile so that staff members and the wider school community are all aware of her role in school and her area of expertise. She credits this to the leadership style of the head teacher who affords her senior leadership team the autonomy and space to develop their roles in the direction and fashion they deem necessary for their professional growth and the improvement of the school.

Another important aspect of the SBM's role is her liaison work with the governing body in which she acts as a conduit between the head teacher and governors to ensure that relationship is productive. She has also received considerable support from governors who understand and appreciate the importance of her role:

I have worked really closely with the governing body from the minute I started here and they've always been extremely supportive and understanding of my link … that's a huge part of my role … the way that I liaise and link with the governing body ensuring that they are up to date with the current trends and legislation and Ofsted … making sure that they're informed so that when they come to meetings they can ask the right questions.

Participant A has also proactively sought to develop her knowledge of the curriculum and pedagogy in the school seeing this as a key means by which she can improve her own organisational management practice. For example, she has attended and observed appraisals of teaching staff (both teaching assistants and teachers) and also teaching staff meetings:

I will get involved with the appraisals from an observation point of view … I think that's really, really important for me, to understand the business of the school … I'll attend the staff meetings when they're talking about the curriculum. Now that's not my area of expertise, but to have an understanding of the challenges that face them … helps me when I'm looking at the budget and we're looking at different areas.

Her involvement in these processes, even as an observer, has helped to raise her profile amongst teaching staff and allow her to make more informed decisions surrounding finance and resourcing. Additionally, it has helped to build her credibility, something she sees as vital to her role being accepted and understood. Indeed, in her own area of the school she has actively led by example maintaining visibility and supporting her colleagues, as she explains: '*I wouldn't ask anybody to do anything unless I was prepared to do it myself and I think I'm probably quite visible in that from the ground up. I would turn my hand to anything and try and help anybody with anything or find out for them.*' This visibility also extends before the school gates to the wider community with which she has developed links and raised her profile, not only for her own professional identity but to help ease workload on senior leaders: '*I thought if I could get to know the community and they knew me and knew that I was the sort of person that they could come and speak to or ask then actually, anything that I can do that promotes or releases teaching time or takes the flak off what's going on, because I think it's always been for me really important.*'

While her role is understood and appreciated with the context of her school and the wider community, participant A still feels there is work to be done within the wider school system to develop school business management, an area she describes as a 'fledgling profession'. In some ways, participant A sees this as an issue of misconception and misunderstanding within the wider education sphere surrounding the nature and purpose of the SBM role, as she asserts: '*I go to very … a lot of meetings and if you mention the business word … it's like tumbleweed going through and in education in particular it is seen as a dirty word and I think perhaps that's why there is a bit of a reluctance.*' Part of the challenge then according to participant A might be semantics and the title of the role that can and often does mean different things to different people. She feels there is a responsibility at individual school level to address this disparity and ensure they understand the level of organisational support and capacity they require, particularly when advertising for an SBM post:

It doesn't sit well with a lot of people in education when they talk about business and so sometimes I wonder whether it's the right title … And you see that very much when you see posts advertised for business managers and the schools that get it and understand it, pitch their post specifically, pitch the salary correctly and will definitely benefit from that. There are other schools who pitch and you look at it and think they've heard the word 'business manager' they have no idea what the role is, they don't know what a business manager's going to bring to their school.

For her own perspective, participant A is clear in her professional values which are underpinned by a commitment to public service and the welfare and educational outcomes of young people: '*I very much embrace the fact that I am holding the public purse, I am a taxpayer and I think 'how do I want my money spent best?' And I keep that very much to the front of my mind when I'm looking at any kind of procurement in school and what we're doing.*'

Appendix 2: Grove Street School

Context

Participant B is the School Business Manager at Grove Street school, a non-selective, independent school serving just over 400 pupils between the ages of 2 and 16 in a suburban locale to the south of England. The school received a positive report during its last Ofsted inspection, specifically the quality of the curriculum, teaching and assessment, and school environment. The school is currently part of a group of schools operating under the same parent organisation.

Professional background

Participant B has completed the CSBM and is partway through studying for an MBA. Prior to this, he studied human geography at undergraduate level with the intention of a career in town planning within local government. However, following several stints managing bars during university, he decided to follow this route pursuing a training programme for larger pub chains and subsequently managing large, city centre establishments and eventually a larger venue with 15 supervisors and 80 staff members. During this period, he oversaw the refurbishment of a number of venues under his management picking up vital skills along the way:

That was not just about the interior detail but rebranding so we changed the name, what was served, the menu, the uniforms and the whole ambience and atmosphere … So that's sort of business development, it wasn't just about running a business but actually the development of it as well.

These general management roles with the associated plethora of responsibilities and range of dispositions required would sow the seeds of his future career as an SBM, as he explains:

I hadn't necessarily had any formal training in management or marketing or branding, it just happened along the way and I think in the role of general manager role of a busy city centre bar … you really had to be quite a jack of all trades, so one day you might be in the kitchen, next day it's processing all the financial accounts and paperwork and other days it's being a customer ambassador.

From here he moved on again to a middle-management position within a large supermarket chain with responsibility for the considerable income it generated and also line managing and supporting the career development of a number of departmental staff. Again, while this post provided valuable experiences, he found the role slightly repetitive and lacking the entrepreneurial traits he was accustomed to. He therefore took the decision to take a temporary career break to look after his growing family whilst his partner returned to work as a teacher from maternity leave. This gave him time to renovate his house and reconsider his options and it was during this time, whilst reading through the job adverts, that he spotted an SBM position, the description of which appeared to align with his knowledge, experiences and interests, as he explains: '*I think I developed an interest in education with my wife being a teacher and obviously having three children myself as well and when I looked at the job description, lots of it was based around skill sets and experiences that I'd had in my previous roles, so … the two seemed quite a natural fit.*' He applied successfully for the position in a state-maintained primary school where he became their first-ever SBM. This proved a valuable learning curve and afforded him the opportunity to develop his knowledge of financial and organisational management in schools before his ambitions outstripped the post and he moved on to his current position where he has been for the last six years.

Role composition and responsibility

As the SBM at Grove Street School, participant B is a member of the senior leadership team, line managing all support staff, including a core business management team that have responsibility for finance and payroll, procurement, pupil data and communication (with parents and the wider community). He also manages the catering team, the caretaker and his assistant, and three minibus drivers. His role is therefore more strategic in scope, including budgetary planning and forecasting in collaboration with the head teacher and marketing manager, particularly in relation to current pupil numbers, historical trends and future projections. The school is part of the independent sector so pupil numbers represent their top income line and are therefore very important. Participant B has also led and managed a number of design and maintenance projects across different areas of the school to improve the buildings and premises and create a more positive work and learning environment for the staff and students, as he explains: '*in my nearly six years of being here there's probably only one half-term holiday where we haven't actually done any development work to the site … every other holiday something has happened … be it from painting a classroom up to complete refurbishments of teaching blocks to new builds to redecoration to the outside of this building, fencing around the all-weather pitch, etc.*' He embraces the multifaceted nature of his role and believes this is characteristic of the wider profession:

I really do enjoy coming to work every day, no two days are the same, every days is different, but if I looked at my job description now … and if I were to see another almost identical school down the road with an almost identical job description there's no guarantee that the two jobs would end up being the same.

His role was the first SBM position at the school and reflected the changing educational landscape and perspective of the current head teacher whose predecessor had a different view of the financial management of the school: '*the former head, I've been led to believe, perhaps had a little bit of an old-school approach, "I know what I'm doing, and what this school's about" and actually … as long as the books balance, etc. And I think in some ways the school was possibly showing signs of lack of direction and development strategy, and I think at that time, going back about ten years, the market was relatively buoyant and actually maintaining pupil numbers weren't necessarily a concern.*' The current head teacher had been in post for six months when participant B was appointed

into a role, which he admits bears little resemblance to the job description of the post he originally applied for. Rather, he has been afforded the freedom and flexibility to develop the role according to his own evolving skill set and the changing needs of the school. This has been facilitated by his professional and critical working relationship with the head teacher who understands the scope, purpose and potential of the SBM role:

I think one of the key things is having a relationship with the head where, yes, there's that element of line management and respect that you have and actually the buck stops with them, but at the same time if you have got experiences from the outside world or even from within the role, that opportunity to challenge, not just for the sake of it, but actually "is that the best decision or can we look at things a different way?"'

He also reflects on the combination of the position of the school and where it was in terms of its development trajectory when he took on the post and the skill set he brings to his profession with his experience of and appetite for troubleshooting and organisational improvement: 'it's partly a bit about me, my personality, background and skills, but again, where the school is at and you know, within its lifespan, within its development profile and within the marketplace as well I suppose.'

Professional identity

When he started in his current post, the staff were, perhaps unsurprisingly, unsure of the exact nature and purpose of the role and what it involved. This sense of uncertainty was heightened further by the fact that the school had not previously employed an SBM. Quite naturally, questions were raised such as 'why do we need a school business manager? We've never had one before, why is this chap coming in being paid that amount of money … when we haven't needed it?' However, as highlighted above, he quickly set about his tasks identifying areas of the school where he could improve provision and secure resources to support the learning environment: 'and then actually within a year or two … once they saw that windows had been replaced or something had been refurbished or a new system has been initiated, I did actually get feedback from them saying "you know, I might have doubted your post at first, but actually I can see a positive difference and the need to have an SBM in place."' In doing so, he was able to make himself known and increase awareness of his role to staff members, thus raising his profile across the wider school:

I'd probably interacted with most members of staff by the end of my first term on a personal basis … whether or not that was a radiator that was leaking in their room or it was to look at how we might improve the reporting process, and I think it was only when there were tangible, recognisable differences that I'd made that people thought actually something has been achieved and it's this person that's done it and actually, would we have had that if he wasn't here?

Participant B has also been involved in a number of areas of the school that are outside of his SBM role, including playing the piano in assemblies and attending school trips both home and abroad, again, as a means of furthering his interaction with the school community: 'it's those opportunities through both spending time with colleagues and the pupils as well that help you gain a little bit more of an understanding … I don't perceive my job as purely black-and-white number crunching.'

In terms of the broader SBM profession, he believes that there is some disparity in role composition and responsibility between schools just as there is disparity in the organisational structure, context and culture of individual schools. However, he suggests that much of this disparity is in the additional responsibility that SBMs hold, over and above a set of core dispositions that would be typical of most members of the profession:

There's probably a core element of strengths, skills and attributes of the job which are almost a given across roles … primarily from an administrative function but then it's how much then is just purely administrative and actually how much of it is creative aspect and developmental aspect and so whilst lots of us have that sort of element in the middle which is probably strong and consistent through 99% of the SBM population, I think it's the peripheral bits which will differ according to the needs of the school.

He also cites the head teacher's perspective of school business management and how they view the role, its function and potential as a key influence. So, those head teachers that advocate for the profession and its place in the school system will facilitate the growth and development of the role, whereas: 'if you've got someone who is very old school, who's been set in their ways and wonders what the benefits are, then one would assume it's not going to be a successful relationship and … it's not necessarily going to achieve the same advantages and benefits.'

Furthermore, participant B highlights the shifting nature and characteristics of the profession particularly given the historical source of SBMs or Bursars, with incumbents of the role traditionally heralding administrative support staff or perhaps in the case of the latter, frequently from a military background:

I think going back sort of 10, 20 years or so ago it would generally be finance assistants or similar that then might increase their hours and they might increase their area of responsibility a little bit and all of a sudden they were left with a bigger role which suddenly became a school business manager.

He points out that many of his peers have followed a different career trajectory with professional backgrounds in finance and business, bringing with them a skill set including accountancy, project management and marketing. This might be indicative of a more highly skilled cohort compared with their predecessors and also the means by which school business management is becoming more professionalised.

Appendix 3: Chapel Lane School

Context

Participant C is the School Business Manager at Chapel Lane school, a smaller-than-average primary school situated within a large urban centre in the south of England. The school serves around 225 pupils between the ages of 3 and 11 from a broad range of ethnic and religious backgrounds whereby three quarters of the student intake speak English as an additional language. The number of students with a disability and with special educational needs is above the national average. Following its last Ofsted inspection, the school was deemed to 'require improvement', though progress has been made since the previous inspection in 2013 when the school was deemed 'inadequate'. Since then, the current head teacher and her leadership team have worked hard to improve the quality of education at the school:

The head teacher, ably supported by other school leaders and the interim executive board, has been tenacious in driving improvements in teaching, behaviour and the early years. There is a culture of pupils and staff striving to 'be the best you can be'.
(Ofsted, 2015, p. 1)

Chapel Lane is part of a hard federation with a local secondary school whereby both settings share an executive governing body. The local authority maintains both schools.

Professional background

Participant C started her career in banking before moving into the school sector where she has worked for around 25 years, firstly as a financial administrator and then as an SBM, a role she has undertaken for the last 12 years across a number of schools during which time she has completed the DSBM, CSBM and ADSBM. The scope of her role has changed considerably over the years with regard to the level of responsibility she holds, as she explains: '*My first head teacher in a primary school, he used to do everything … he used to do all the budgeting, you know, if there was a letter to be written, like an exclusion, he would write all the letters, he kept it all to himself."* However, it was under the leadership of a particular head teacher that her role began to change: "*I came down to London and had a head teacher who was quite visionary and put me in for the CSBM and treated me really as part of the leadership team.*"

She has occupied her current role for two years, having been appointed by the local authority as part of a drastic school improvement strategy following the 2013 Ofsted inspection highlighted above. Whilst this was a tough start to the role, it also benefited her in terms of how she was and has since been perceived by her colleagues given she was appointed straight into the leadership team established by the new head teacher who was also brought in around the same time:

From the minute I came I was actually more involved than anybody with the head teacher and with everything that was going on because there was so much to do about the school, the premises were falling apart, there was … so many personnel issues to deal with … so rather than building the role up, people in that situation visualised you differently because you're new … but you've always been part of the leadership.

This has been important because of the scope of the improvement that was required from both an educational and organisational perspective with significant staff turnover and considerable buildings and maintenance work to attend to in order to physically secure the school, as she explains: 'it was a nightmare, we had Ofsted every term, we had a project group meeting every month and all of those meetings had a massive amount of paperwork … we were under the magnifying glass all the time, as I say the building was actually a wreck.' Things have stabilised somewhat since that time and participant C now has a team of staff members working under her line management to support her in her role and the organisational management of the school.

Role composition and responsibility

As explained in the previous section, her current role coincided with a particularly turbulent period at Chapel Street School. When first appointed, participant C was handed responsibility for most of the organisational management functions of the school, including finance, premises, buildings and maintenance and human resources. Moreover, she was tasked with leading the reorganisation of the previous systems and procedures in these areas to support the school improvement process. This has been a step up from previous SBM roles as she explains: '*I've been here nearly two years now and I've dealt so much with premises, project management and … just general buildings maintenance, all that sort of thing falls on my shoulders now where it didn't in my other school.*' She does, however, have two support staff members in the school office who assist her with her role in the financial and clerical aspects of the organisational management of the school. Indeed, the capacity building and investment in this area have been welcomed, particularly as participant C is close to retirement and is hoping one of these individuals will succeed her, although she is aware that not every primary school SBM shares this privilege:

I had two members of staff in the office, Jess out there who does like a bit of the financial side and Elaine who's the main receptionist and they're both very busy all day. I mean I'm kind of getting closer to retirement now so my aim here is to train Jess up on a lot of what I do, but you don't always have that facility.

Yet, despite this additional capacity and support, she still feels the workload and remit of the role can be and often does become overwhelming and that the nature of many SBMs is to simply assume this extra pressure, as she says: '*I do too many hours, I come in at quarter past 7 and go home usually about half 5, 6 o'clock … I work most weekends from home … and I think that's the case with a lot of business managers, you get on with it. But you don't get paid for the extra hours.*' Moreover, the almost 'boundaryless' nature and broad scope of the SBM position can create circumstances where the SBM has cultivated a role in which individuals such as participant C often undertake responsibilities far beyond any reasonable job description. According to participant C: 'when I left my last school and came here, I had to give two months' notice the head teacher said, "*Can you write down everything you do?*" "No! a) Why should I? You know, I've kind of gathered that knowledge over the years and b) it would take me forever", I just couldn't do it.' As such, in addition to potential workload issues for the incumbent, SBM

succession planning can also be challenging. At Chapel Street it would seem they have a plan in place for an internal successor to participant C but this may not necessarily always be the case even though the varied nature of the role would suggest it ought to be a priority for schools.

Professional identity

Following on from the previous section, the idea that the SBM role and how it is perceived can and often does differ quite significantly between schools is something participant C was quick to point out when reflecting on the different SBM roles she has encountered: '*One was all about health and safety and premises management and another one was very financial and then another one was what I call a business manager who sees everything. So the perception is still very, very different in every school you go in.*' In her opinion it is the head teacher who tends to shape and influence the composition of the role whereby '*the head teacher here treats me very much like a deputy head, where I go and coach other business managers and a couple of them I go to don't have a lot of contact with the head teacher at all.*' However, she also suggests that other senior staff members can influence the profile and status of the role and that there is often a disparity between how the head teacher and other school leaders view the SBM function:

A friend of mine is a business manager and her head teacher treats her like a leader but the deputy head tends to treat her very differently … more like a receptionist.

Indeed, she believes there remains a clear binary between teaching and non-teaching or support staff in schools which can create challenges for the SBM who is often the only non-teaching member of the SLT yet not necessarily viewed or treated in the same way as the qualified teacher leaders. This lack of parity can also affect the salary that SBMs can command despite their comparable levels of responsibility in school:

We're still classed as support, not leadership … and actually we're supposed to be part of the leadership team. And the pay scales … why are we not on the leadership scale? I think it would be really good for the profession to have a kind of recognised pay structure that's connected to the leadership scale so that there is more parity.

The means by which SBMs' salary scales are determined is an issue that is raised often amongst members of the profession, particularly as this tends to differ widely between local authorities and different regions of the country.

Despite these issues, participant C believes the profile of school business management is rising across the system and schools are becoming increasingly aware of the importance of the role. For example, many schools, including her own, have invested in organisational management capacity in recent years, as she explains: '*when I first came to London it was quite the norm to have one person who was doing everything. Now in most offices there are three people, you know, the business manager and two others, even in the smallest schools. So it is gradually growing.*' She also suggests that professionalism amongst SBMs has developed, facilitated by the professional pathways and credentials that the diplomas in business management have provided:

I think people take you more seriously if you've got those qualifications. You know … if you put your job CV or an application in, you would be considered, it does make them look at you and think "oh, this person has done that so they're obviously very professional" rather than … you know, someone who hasn't done them. And there are still quite a few times … it says you must have the CSBM and working towards the diploma or above.

In addition, she highlights the SBM networks with which she is involved as further evidence of the evolution of the profession. For instance, there are a group of SBMs within the local school system who regularly converse to discuss issues and seek advice from one another rather than calling the local authority, as might have been the case in the past. In fact, the local authority will often call them for their expert advice and support:

They [local authority] phone me up quite a few times, "can you go and help this school? Can you coach this business manager, she's new, she's not been a business manager before." So they do and they have like four or five of us I think that they will approach to do that sort of thing.

Examples such as this offer encouraging signs that the profession is becoming more established within the school system and that, importantly, SBMs are at the shaping its future trajectory.

Yet participant C also highlights the shift in expectations of the kind of skills and dispositions SBMs should be bringing to the role, related in no small part to the mass academisation of schools in England. In particular, she is concerned that with many academies recruiting SBMs with accountancy skills to deal with their devolved budgets and financial affairs they are simultaneously hiring individuals without the school-based knowledge that many SBMs hold:

Several of the business managers I've been coaching have come in from business, not from school background … now I'm not totally convinced that works. I can understand the rationale behind it, I can understand they want someone with business acumen to come in and maybe in a secondary school it works because there is much more a structure of a corporate business … you know, you've got the people underneath you to do the operational stuff. But in a primary school … you literally have to know how to do everything yourself and a lot of the time you just have to get on and do it yourself, you can't rely on other people.

Related to this is the question of where the SBM role will be positioned in the school system going forward if the majority of schools are converting to academy status and academies are increasingly looking for SBMs with accountancy and financial, rather than school-based, professional backgrounds. As participant C explains: '*they're pushing for academies for everybody now and they're not happy now with single academies, they want you to be a multi-academy trust and they were talking about having a CEO at the top of it rather than a head teacher and so where does our role come into that you know?*' This is a valid concern given the recent and quite radical structural reforms to schooling in England and the implications for the organisational management of schools in particular.

Appendix 4: Greendale School

Context

Participant D is the School Business Manager at Greendale School, an average-sized primary school situated within a suburban locality of a large city in the north of England. The school serves around 280 pupils between the ages of 3 and 11, half of whom are of white British heritage with the remainder made up of a broad range of ethnic and religious backgrounds with 13 different languages represented. The number of students eligible for Pupil Premium funding and FSM Ever 6 is above the national average. Following its last Ofsted inspection, the school was judged to be 'good' with particular attention given to the improvements to teaching standards whereby: 'the head teacher and other senior leaders take immediate and effective action to tackle weaker areas of performance. As a result, achievement in writing and the quality of teaching have both improved since the previous inspection' (Ofsted, 2014, p. 1). The school is well known within the local authority for its policy on inclusion and strong record of providing support and provision for students with special educational needs. While Greendale is a local authority maintained school, it is also part of a local cluster of schools. The cluster works independently of the local authority and collaborates on strategic issues, extended service provision and economies of scale for its members.

Professional background

Participant D started her career in the insurance sector, then insurance loss adjusting and eventually a local government role before securing a position in a school helping with extended services on a part-time basis. However, the lack of diversity in responsibility led to her seeking a more varied position as an office manager in a different school where she worked for 18 months before applying for her current role as SBM at Greendale, a position she has now held for the last six years. In terms of qualifications, she has completed the CSBM and DSBM and is currently awaiting final results for the ADSBM qualification.

When she started in the role, the school was in urgent need of maintenance and repair with a number of structural issues, the management and resolution of which was a key priority for her and the head teacher who had also started in post at the same time. As she explained '*when I came to the school, the building maintenance had been left, so we've had to pick all that up … we're at the point now where we can do things here that we really want to do rather than things we have to do.*' The school is now expanding due to a significant increase in student numbers. There is also a Children's Centre, Learning Support Unit and Early Years nursery provision. Due to the size and complexity of the school and the work that has gone into this expansion over the last few years, participant D's role has been a huge step up from her previous position in terms of responsibility and remit: '*at my last school it was mainly running the office, overseeing a couple of staff and doing one budget and one sundry account whereas here, it's overseeing thirteen staff … my team's growing so at the end of this expansion it could be anything up to twenty staff.*' However, her previous experience has served her well in the role as she explains: '*I've had previous experience of insurance claims and underwriting and loss adjuster visits to site for large claims which has provided me with knowledge of how buildings are constructed. I've built on that by undertaking additional training courses to enhance my knowledge.*' This provides a good example of the range of skills and experiences that are often required to succeed in an SBM role, particularly in a larger and/or expanding school.

Participant D also worked for the local authority in a debt management capacity for 5 years, a role that provided valuable experience of effective debt collection methods that she has drawn on within her school for pursuing and managing financial debts and transactions. She has also gained relevant experience in local government to be able to effectively advise and signpost parents and stakeholders to other services.

Role composition and responsibility

As highlighted above, participant D's role has evolved somewhat alongside the expansion of Greendale and also in line with the changes at local government level in terms of the reductions in the level and type of support the local authority provides in recent years. The core aspects of her role encompass the management of finances, human resources, premises and maintenance, health and safety, risk management, pupil welfare, and administrative functions. The children's centre and learning support unit operate as distinct units from the main school and so require separate financial and organisational management (including their own budgets) all of which falls under her remit. Participant D has 4 budgets to plan, monitor and administer for the whole site along with 2 credit cards and 3 sundry accounts. She also takes responsibility for the performance management and appraisal of all support staff across the site and oversees the after-school club coordinators. As the school and her role have expanded, so the number of staff has increased, including her own team, though participant D believes the school will have to build more capacity going forward:

Obviously the workload has got greater, so we've got another administrator, we've also had an apprentice that's left and got a promotion … we're looking at potentially more cleaners, more lunchtime staff, the potential for a site facilities sort of person, so … that's what I predict, I can see that's going to happen because in 6 years' time the school will be a lot bigger.

For example, the school site will soon include a multi-use sports area that, in addition to utilising for their own students, they will be able to let out for use within the community generating more income for the school and benefiting the local area. As she explains, such expansion will necessitate more capacity: '*there's a lot of things on site we can exploit once all the building work has finished … we will have a multi-use gaming area on the field so we want to push lettings, all that side, so that would necessitate a facilities person.*'

In addition, her workload has grown as a result of the decline of the local authority, which, like many areas of the country, has seen its funding cut and therefore capacity to support schools reduced quite considerably:

A lot of work [from the local authority] comes our way. I mean admissions are a big piece of work that we never used to have to do. The only bit of admissions now that the authority really coordinates is the reception places, anything else sort of waiting list wise, leavers and things, we manage from the waiting lists, but we have parents coming in to us and asking for spaces rather than ringing the authority.

Participant D does raise concerns about the volume and diversity of her workload: '*I mean I'm 43 now … I'm asking myself the question could I keep this pace up when I'm in my 50s and the answer would be no! People think that you're sat at a desk all day and you're not.*' Furthermore, because of the way the role has grown organically around the expansion of the school and her own willingness to take on more responsibility far beyond what she was originally employed to do, there are issues surrounding her current job description:

Every day is different; you can't predict what you're going to be asked any more. I am not supposed to be involved with this [building expansion] at all but you can't be anything other than involved with it when it's on site and you've got health and safety issues and risks to manage and people to manage but … until we get bigger and we take the children, it's not going be reflected in the current job description.

This then raises the question of succession planning and how realistic it might be for Greendale to succeed participant D's position in the future given the scale of her role and the broad range of responsibility she undertakes.

She feels at this stage of her career and with the experience and knowledge she has accumulated that she would like to move away from the operational side of the role to focus more on the overarching, longer-term goals for the school, as she explains: '*the thing that frustrates me is with the courses I've done, I actually want to be working more strategically in this role, looking at long-term and big projects and pieces of work, but the day-to-day bits … it's constant interruptions.*' For this reason, the head teacher allows participant D some time to work from home every two weeks where she has space to focus on strategic management.

Professional identity
Raising the profile of her role within the school and amongst the staff members has been an important part of the professional journey for participant D.

I've explained to people what the role entails and I go to meetings now so I can give my perspective on things, like the teachers' meetings and the support staff meetings to link everything up that way … so I can give them my opinion, as the business manager and the financial side of it and things like that. So I've tried to raise the profile of the job in school.

Not only has this served to increase awareness and understanding of the SBM role, it has also enabled her to build professional trust amongst her colleagues and break down some of the barriers she initially faced as a new staff member in a new position with a not inconsiderable level of responsibility within the school. She believes this is a fairly typical SBM experience given the relative infancy of the profession:

I am someone that people talk to now, people see me as someone they can trust … so the staff do know they can ask me things and they'll get the answer or it'll get resolved … I think the status has been raised over the last couple of years. I don't think it [SBM role] was fully accepted straight away. People saw it as just another level of management that wasn't particularly necessary to start with, but … our school couldn't function without one now.

Indeed, the level of decision-making and status of the role with the hierarchy of the school can often be a challenge for SBMs, particularly from teaching staff who might not be used to seeing a non-qualified teacher on the leadership and management team. As such, building this rapport with colleagues and communicating the purpose of the role is crucial, as participant D explains: '*I don't see how you can do this job if you haven't got people on side that trust you or your judgement … just from a finance point of view I've had quite a big sway on the school finances, in the way that they're actually managed and how things are ordered.*'

She also feels strongly that SBMs ought to be taking responsibility for their own professional learning, particularly given the scope of the role in many schools and the opportunities this provides for incumbents to develop their skills, as she asserts: "*some people just want to go into work and do the same thing and know what they're doing and this isn't a job like that.*" Despite the issues surrounding workload, she believes that for the broader profession to survive and thrive in a turbulent educational policy environment and ever-changing school system, incumbents of the role are required to be proactive and forward thinking:

You can't say that you don't know something - if you don't know something then you either need to go on training or find the answer, that's how it works. That is how I've got the knowledge in this job because it is thinking on your feet a lot of it and it's convincing other people that they need to do that as well!

Participant D is a member of a local SBM network of around 14 individuals from the area who meet once every half-term to discuss ideas, problems and best practice. They have a shared list of contractors that they all use in their respective schools, affording them useful references for such services and they also bring in guest speakers to demonstrate new products which they can then purchase as a group and take advantage of economies of scale. These networks offer an encouraging sign of a group of professionals collaborating to share expertise and improve their practice.

However, according to participant D there are also a number of concerns relating to the SBM profession more widely, including, for example, the extent to which the current suite of diplomas is fit for purpose in the current educational climate. As discussed earlier, participant D has completed both the CSBM and DSBM and is currently awaiting results of the ADSBM qualification she has recently completed. She is acutely aware that many schools, academies in particular, are increasingly looking for candidates with accountancy skills and more specific qualifications: '*which is quite frustrating because when I came into this job it was all about undertaking study of the SBM qualifications, so I've worked my way through them, I'm at ADSBM level at the moment but then when I finish that I'm going to have to now revisit doing accountancy because it's becoming more and more obvious that that's something you're going to need … I keep doing exam after exam after exam and then the goalposts get moved.*'

Another significant issue, not only in her own school (as highlighted above) but more generally across the system, is SBM succession planning. According to participant D, one of the factors at play here is the level of pay that SBMs are generally entitled to across the system, which is variable. Whilst academies can set their own pay and conditions of employment, maintained schools remain at the whim of their local authority, many of which do not recognise the SBM role as a leadership position of parity with qualified teacher leaders, resulting in a much lower pay scale. Given the scale of the role in many schools, this then becomes a stumbling block for aspiring SBMs, as she explains: "*that's potentially putting off candidates because they'll look at a job spec and think 'my God, I can't do all that! I'm not doing all that for that!'*" It would appear then that many of these challenges facing the profession are related to the (part) academisation of the system and the idea that the SBM role can look very different depending on whether your school is an academy or maintained. Whilst academies can offer more attractive salaries, the post holder is likely to have more responsibility than an equivalent in a maintained school and may also require a higher level of qualification and credential. Furthermore, as participant D suggests, the local authority does offer a certain level of security and support: '*I keep toying with the idea of looking at jobs in academies but then … you've not got the council to fall back on, so I need to look at the qualifications I've got really to make sure I'm fully qualified to be able to, especially with the finance side because it's a lot different in an academy.*'

Appendix 5: Stoneleigh Academy

Context

Participant E is the Director of Business and Finance at Stoneleigh Academy, a larger-than-average secondary school situated in a suburban location in the north of England. The school serves around 1100 students between the ages of 11 and 16, most of whom are of white British heritage while the proportion of their student intake eligible for pupil premium and those with a special educational need are above the national average. The school moved to a brand new purpose-built building in 2011 and was inspected by Ofsted two years later when it was deemed as requiring improvement. Stoneleigh converted to academy status in 2015 as part of a large multi-academy trust and in 2016 appointed a new head teacher and executive head teacher.

Professional background

Participant E spent much of her career in the police force where she worked for 24 years as a financial and administrative manager with responsibility for a range of areas, including finance, administration, human resources and estate management. With this knowledge and experience, she was ideally placed to make the transition to becoming an SBM, a role she has occupied for the last 12 years. However, she freely admits that despite the relevance of her skill set, she found the transition to education quite a challenge:

The difficult thing I found initially was the vast array of things that you have to get involved with, so … when I first came into school 12 years ago, it wasn't a surprise to me if I finished up in the reception selling ties to the kids or out on lunchtime duty making sure that there was an orderly queue because something was happening in school or … helping mop up where a child had spilt something … it came as a bit of a culture shock.

Yet she quickly grew into a role that has evolved alongside the policy shifts and associated structural reforms that have characterised the school system in recent years. Indeed, though the school only converted to academy status in 2015 they had been steadily taking ownership of their organisational provision over the preceding years, a process with which participant E was closely involved:

We hired our own HR manager, so we didn't buy in personnel services from the council, we ran our own payroll so we didn't buy in payroll from the council, we ran us own catering service so we didn't buy that in from the council … a lot of the things we were stand alone, we developed in-house, which actually helped when we came to convert to an academy.

Further, as a member of the senior leadership team, she has in the past been given her own form group of students, though recent changes to the leadership of the school and the academy conversation have scaled back this particular role. She has subsequently built up a wealth of experience relating to the organisational and financial management of schools and also worked closely with students, which for an SBM is relatively rare.

Role composition and responsibility

Her role encompasses much of what would typically be considered as school business management, including predominantly financial and human resources management, health and safety, and estates and premises. She also runs the school catering service and community lettings (of school buildings and facilities) as separate businesses that generate income for the school. Until recently, the school ran its own payroll system which they also delivered to other schools in the area as another income stream but as she explains, they stopped doing this after the conversion: '*because the academy trust has its own payroll provider and so it was compulsory for us to join in with their payroll.*' As highlighted above, the recent academy conversion has had implications for the composition of the SBM function at Stoneleigh whereby participant E's role has become less operational as she explains: '*recently we've converted and become an academy … and so to be able to accommodate the multi-academy trust requirements, particularly for financial management and reporting, the role has gone much more strategic.*' So, for example, participant E has a number of staff working under her line management:

It's the strategic direction and projects and obviously the budget for the catering service that I'm involved in whereas the day-to-day running of it I leave to the catering manager. In terms of finance I also have a finance manager who on a day-to-day basis is responsible for transactional processing, by that I mean making sure that people are complying with financial regulations, submitting purchase orders, invoices are coming in, they're all authorised and loaded on to the systems correctly and that type of thing.

This then leaves participant E space to work more strategically in areas such as monitoring and setting the budget and discussing financial forecasts with the senior leadership team, the governing body and the trust. She also has responsibility for the monthly and annual close down of accounts and the three- to five-year financial projections for the trust. Her human resources responsibility includes dealing with interventions for staff attendance, sickness, capability and disciplinary procedures. However, another consequence of the academy conversion has been a reduction in capacity in some areas of organisational management due to the central hub of services now provided by the trust:

We used to have a health and safety person, they've gone; we used to have a Human Resources manager, they've gone, so you just have to consume what other people have left, they don't replace the posts.

As she explains, this has led to an increased workload and a feeling of less in-school support whereby any problems she now encounters must be relayed to the trust's central business management services (not dissimilar to the old local authority in this sense.) The trust does run a monthly SBM meeting in another city that is relatively equidistant between the member schools where, as participant E explains: '*the finance manager will tell us what's happening on the management front and explain to us if there's any new initiatives, any new grant funding, anything that they want from us reporting-wise, anything changing, any new systems and obviously Human Resources will do the same, potentially there might be some new employment law that you have to think about …*'

Additionally, as one of the eight members of the senior leadership team at Stoneleigh, participant E is linked, alongside another senior leader, with one of the four student houses within the school. As such, she is expected to provide a pastoral role by attending assemblies and keeping a track of the students within her house who are having problems with attendance and behaviour to offer them support and guidance.

Professional identity

Participant E has worked hard to develop an awareness of her role across the school and amongst colleagues, particularly teaching and senior staff members. Of course, her fellow senior leadership team colleagues are well aware of her role and responsibilities at Stoneleigh but the other staff members have also come to understand her position in the school:

I think that particularly because of the HR experience that I've developed over the last years, they [staff] certainly appreciate my support and advice in terms of HR and finance, they're always coming through and asking me questions, "how can I do this? How can we make this happen? I know this might not be in the regulations but how would you suggest we get round this?"'

However, this was not always the case, particularly when she first started working in education when she faced significant attitudinal barriers to her role specifically from teaching staff who were suspicious of the level of responsibility associated with the SBM position:

I've got to say when I first came to work in education that I felt that educationalists believed they were the only professional people on earth! But it's about building up respect and credibility isn't it? And then actually when people learn that … OK, you need to have a qualification for what you do or actually, no you need to have several qualifications for what you do and I do have a Master's degree and an accountancy qualification and probably spent more time in university and colleges than you did to get your teaching qualification.

Such barriers were deconstructed through her leading by example and making improvements to the organisational management of the school through, for example, the changes she has made to the systems and processes that were in place previously. This, as she explains: '*was a culture change and as you know, a culture change … takes quite a long time for people to work through and come to terms with. In terms of finance that change has happened and is embedded in our school.*'

Indeed, generally speaking, she believes the profile of SBMs has risen across the school system in recent years facilitated by structural and organisational changes in schools and helped by the support of professional bodies in education:

There are more and more business managers in schools … and I think it's more high profile than it used to be and I think opinion has changed about business management … I think that they're seen more now as an asset to a school, there's quite a few bodies that … are helping and supporting that, obviously NASBM is one of the biggest ones and ASCL.

The support of such organisations for the work of SBMs is vitally important to the development of a collective professional identity amongst this group and raising the profile of the profession. For instance, the Association of School and College

Leaders (ASCL) are currently working to get improved pay and conditions for SBMs that will be equivalent to other senior leaders to recognise the level of responsibility they have in schools. Further, the existence and growth of the National Association of School Business Management (NASBM) and events such as their annual conference are also energising the profession as a collective group. As participant E explains: '*it's not a local bursar group any more, it's professional people nationally … getting together now and meeting, you know, because the issues that I face in my academy are being faced in London and in Manchester and in every other academy.*'

However, on a more personal basis, the conversion to academy status and the membership of the multi-academy trust (MAT) has had a more detrimental influence on participant E's working practice and professional identity. Whereas she feels recognised and respected as a professional within her school and amongst her colleagues, she is not sure she is perceived in quite the same way by the larger trust. In her opinion: '*I don't think people within the trust recognise SBMs as professionals yet which is disappointing and I find that difficult to challenge because if you've got high-level strategic people based in the centre of the trust that don't recognise you as a professional then it's difficult.*' Moreover, she cites a loss of professional freedom since the school joined the trust which she describes as 'prescriptive' in their procedures whereby they have common policies and procedures that all their member schools must follow, including those relating to organisational and financial management:

I think we've got less autonomy now … the communication seems to be more one-way than two-way and I don't feel as though I've got a voice as part of the trust where I did feel quite comfortable and confident in challenging or bringing things forward to the local authority … I don't quite feel the same now.

Yet, whilst the level of autonomy has reduced, her responsibility and workload has simultaneously increased. As discussed earlier, when a school converts to an academy it is often the SBM function that feels the most tangible impact given the differences in financial and organisational management between local authority maintained and academy schools: '*It's had the most significance to the senior leadership team and the finance team in particular, their work rocketed because of all the reporting you have to do as an academy … I've actually had to employ an additional member of staff to support that because of the workload.*'

The nature of her work has also shifted whereby she has financial targets to achieve each year in terms of the amount of money the school saves which is then set aside for the MAT contingency fund to support member schools that might require additional resources. As she explains: '*the trust set a target for each one of their academies to hold 2/¬¬12s of their budget in reserves because they are running more as a business now that they need to have massive contingencies in their bank accounts in case a school should fold or something drastic should happen to one of their academies.*' This has created challenges for participant E when other senior leaders have raised questions regarding the apparent good health of the balance sheet at Stoneleigh, not realising that that money has been ring-fenced for the wider trust. Indeed, this has tested her professional values at times:

We've been asked this year in particular, to loan some of our reserves to the trust to support another school in financial difficulty. But then when you see that your results have not been as good as they should have been and one particular subject that's important to them all, what could we have done and what interventions could we have put in place had we been allowed to use that money that we've loaned to another school?

The restrictions on financial freedom and the ability to resource their own school according to their specific needs is clearly a source of frustration for participant E, but academisation also speaks to issues around support for SBMs and the skills required in managing finances in an academy:

You're now doing company accounts, so you have monthly shut downs, accruals, prepayments, all the relevant things you have to do as an accountant, which you wouldn't do with a local authority … additionally, with a local authority you would get an operational manual that told you how to work within regulations. From the trust all we have is financial regulations that's very high level with no operational manual so you're left to your own devices to make a lot of judgements.'

This has left her low on confidence at times and wondering whether she even wants to remain in her post, according to participant E: '*it's probably the most deflating as well … it's the first time in my career as a business manager that I've thought "Do I still want to be here and do this job under the circumstances within which I have to work at the moment?" And that's a question I've not answered yet.*'

Appendix 6: Larkhill School

Context

Participant F is the Business Director at Larkhill School, an average-sized secondary school and sixth form situated in a rural setting to the north of England and serving around 1200 students between the ages of 11 and 18. Most students are of white British heritage with very few speaking English as a second language, while the proportion of students registered as disabled or with a statement of special educational need is below the national average. In its previous Ofsted inspection, the school was deemed to be 'outstanding' across all areas of provision with inspectors describing the leadership and management of the school as: '*instrumental in both maintaining high standards and bringing about improvements in teaching and in students' achievement*' (Ofsted, 2014, p. 1). Larkhill converted to academy status in 2011 and is a member of a local Teaching School Alliance. It is also a state boarding school housing around 50 students.

Professional background

Participant F began her career in the Royal Air Force as an officer. She then worked in an international office whilst studying for her undergraduate degree where she was involved in marketing and education. She also worked in a building society. She has worked in school business management since 2000, starting out in an administrative position at a grammar school, then moving to an inner city state school for more experience. She then relocated to a more rural setting to take up a new SBM role before being seconded to her current position, eventually taking up the role full time in 2012. The range of skills and experiences she has accumulated throughout her career left her ideally positioned for the role, though she admits she did not initially plan on becoming an SBM:

I've been a business manager since 2000 and really I came into the profession by accident … I liked working in education, I liked organisation and I seemed to have a plethora of different skills, whether they were marketing, finance, income generation, project management and it all just fitted together.

Participant F had been very happy in her previous role at a school in the same region and had been central to preparations to convert to academy status. However, when the governing body narrowly voted against the decision, she was disappointed: '*I thoroughly enjoyed the school and I thoroughly enjoyed my role, but could see that you had to become an academy and we had huge reserves which we could invest in buildings, we could invest in the pupils.*' Conversely, her current school had just converted to an academy but were without an SBM and in desperate need of support. As such, she was brought in to help them out for one day a week: '*and in the time I was just a day a week I got £900,000 worth of investment for a new build. We didn't have a reception; we've now got a reception … and I could see the opportunities and how I could actually use my skills to better the school.*' Feeling she could have much more of an influence on the school and the students working in an academy rather than a local authority school, she took the post full time.

In addition to her professional experience, participant F has undergraduate and postgraduate degrees, has successfully completed the C/D/ADSBM and also accountancy qualifications through the Association of Accounting Technicians (AAT) whereby she is a member of the professional body (MAAT). In addition, she completed the CIPFA Certificate in Financial Reporting for Academies.

Role composition and responsibility

Participant F's role as Business Director is a strategic and overarching position with overall responsibility for finance, premises, human resources, catering and IT. However, she line manages quite a large team of staff who take care of the operational aspects of these areas on a day-to-day basis, as she explains: '*I've got an HR manager, I've got my finance manager and I've got a premises manager, a network manager and a catering manager, they're my big teams.*' While she manages the school budget on a monthly basis, including presenting to governors, she buys in an accountant to complete the final accounts at the end of the year as an additional level of quality assurance. She also undertakes annual performance management and appraisals for her teams of support staff. While she is a member of the senior leadership team at Larkhill, the level of accountability she has in relation to the school finances means she is recognised and remunerated as an assistant head teacher. Due to the scale and scope of her role, she relies heavily on the support of her staff:

My biggest competency I suppose is being able to develop the team under me and to have the confidence to delegate and know that things are going to be done correctly because I wouldn't be able to do this job without my teams.

Having worked in both local authority maintained and academy schools, participant F is acutely aware of the differences in the composition of the SBM role between the two, specifically the heightened level of responsibility. As she explains, whilst maintained schools have the local authority to monitor and check the finances: '*when you become an academy you are the company secretary, you're holding the reins of multi-million pounds of funding and you are doing the management accounts. You're running a business in effect, which is a big difference.*' However, though she enjoys the financial freedom of being an academy and firmly believes it enables her to resource the school more effectively, she has serious concerns about the growing number of multi-academy trusts (MAT) and the model they employ:

I'm not here to make money; I'm here for the education of the pupils. And when you get into a big MAT and it's driven by central services, you might as well work in the corporate sector as opposed to working in school.

These core values are firmly rooted in a belief that the SBM role can and should have a meaningful influence on the education and wellbeing of students through efficiency and cost-effectiveness but also ensuring the school is resourced in a way that will

maximise benefit to the students: *'We're not looking at profit margins, we're looking at efficiencies and savings … but so that they do not impact on the life chances and offering the best in educational terms for pupils.'*

Professional identity

Since its inception at the turn of the millennium, participant F believes the role has grown in terms of professionalism and is generally accepted and understood across the system today. Yet it was not always the case and she had to work hard in the early years to gain respect and acceptance by demonstrating her worth and the purpose and significance of her role:

In my second school, I was the first business manager they'd ever had and it took me a long time to get the respect for the role, but we turned that around … it was when they brought in the financial management standards for schools, so I pulled all the head teachers in the area together and did their training for them and I worked with audit and I made sure that everybody was then prepared and seeing the value of the role.

In her current school she now occupies a senior leadership position and is recognised as such by her fellow staff members. However, in addition to her own area of expertise and responsibility, participant F maintains a working knowledge of educational issues to ensure she understands and can contribute to discussions around teaching and learning with colleagues, as she explains: *'I read constantly so that I can sit in a conversation about curriculum development, I can sit in a conversation about the changes to A levels, I can sit in a conversation about how we collect data, so it's much wider than just the finance and that my opinion is as valued as the person sat next to me.'* Indeed, she strongly believes that such initiative is vitally important if SBMs are going to survive and thrive as a profession within the school system, particularly given the turbulent policy landscape and structural reform, much of which has directly impacted on the role:

Everything changes when you become an academy. Now I'd seen it coming and I've seized the opportunities by watching, you know, national agendas and what's happening so I'd already started doing my accounting qualification. I had no qualification in it … But you can't work in an academy without some financial background or qualification … it took me 3 years to get my MAAT, you know and a lot of money, I paid for it myself. So it was a big commitment.

She also coordinates the regional association of SBMs and school administrators, a vital network within the rural area in which they are all located. SBMs and support staff working in small and often very isolated schools rely heavily on this kind of peer support and guidance: *'we meet three times a year and I get speakers in and we get up to date, but it's networking that's the most important, people email me regularly … a nearby secondary school just turned into an academy so their SBM emails me on a daily basis asking for this policy or that policy and how did you do this and how did you do that?'* In addition, participant F works with the other schools within their Teaching School Alliance to support them with SBM professional development and training and also raising awareness amongst newly qualified teachers and middle leaders surrounding the nature and purpose of the role.

More broadly, at a system level, she is concerned about the fragmentation of the profession, which she believes has been facilitated by academisation and the associated influx of individuals from outside of the sector with specialist financial and accountancy backgrounds increasingly employed as SBMs.

You go to other academies, they've got finance directors who are finance-driven and they're not doing the premises and they're not doing the other side of it … so in one way it's professionalised [the] profession because we are being recognised, you can't go to an academy that hasn't got somebody in this sort of a function … but within that it's becoming more fragmented as people specialise in different areas, rather than being able to do everything because it's a big job.

Linked to this then are questions surrounding the extent to which the specialist diplomas remain relevant in the current school system. According to participant F: *'If you go back to the plethora of qualifications that we used to have, the CSBM, the DSBM, ADSBM, they don't fit the skills for an academy.'*

There is also a wide disparity across the system in terms of what an SBM does and their level of responsibility: *'so … it's hard to say there's one identity of what a school business manager is because we're all doing different roles, we're all doing different things.'* Linked to this is that notion that, as was the case with participant F, many SBMs end up in the role almost by nature of circumstance or accident rather than as part of a planned career route. This then suggests that there remains work to be done to raise the profile of the role so that it can be something individuals aspire to rather than fall into. As participant F asserts: *'we've become much more professional and we've become much more vocal … we are recognised as being key to the success of a lot of schools. But I say to my son, what do you fancy being when you grow up? Last thing he'll say is a business manager because he doesn't even know what I do every day.'* Succession planning is therefore a chief concern for the profession, which, according to participant F, is ageing and risks being usurped by individuals from outside of the sector:

When I look around meetings now and conferences, there are more of us getting to the 50 plus age! The ones who I know who are at the top of the game and really working, we're not getting younger … my concern is the profession isn't developing future business managers, it's developing future specialists who are now seeing the opportunity to move from industry or commercial sectors into education.

She goes on to suggest that this combination of an ageing profession, no natural pipeline for succession and the influx of the specialists from other sectors will lead to the knowledge within the system being lost: *'the qualifications are no longer fit for purpose, a lot of the current SBMs have grown over the years by developing a wealth of skills and knowledge and I think that is going to be sadly missed.'*

Appendix 7: Crooksville Academy

Context

Participant G is the Director of Business and Finance at Crooksville Academy, a larger-than-average secondary school and sixth form situated in a suburban location to the north of England. The school serves around 1700 students between the ages of 11 and 18, the vast majority of whom are of white British heritage with very few speaking English as an additional language. Further, the proportion of students with a special educational need and those eligible for pupil premium funding is also well below the national average. In its most recent Ofsted inspection, the school was deemed to be 'outstanding' with inspectors commenting upon the way the academy: 'combines proud traditions with innovative practice to provide its students with excellent teaching, a vibrant curriculum and highly effective care, guidance and support' (Ofsted, 2011, p.1). The school is religiously affiliated to the Church of England and has been a single-academy trust since its conversion in 2011. It is also a Teaching School and leads the local teaching school alliance through which it runs its own School-Centred Initial Teacher Training (SCITT) centre.

Professional background

Participant G's career path has been both varied and interesting. She began her working life undertaking finance and personnel in the Royal Air Force, where she spent six years before moving between administrative posts and eventually becoming landlady of a public house. She did this for four years before taking some time out of work to start a family, after which she became a driving instructor, a role she also remained in for four years. At this point in her career, she decided to return to college to retrain and update her skills: 'because I'd never used a computer and they suddenly become the norm, so I did a course called Women in Accounting and Finance so … I learnt to type and use computers and did computerised accounting.'
Following the completion of this course, she started a new role in a school as the accounts clerk, a role that was, by her own admission, 'very low level'. She did this for two years, during which time she was able to develop quite quickly because of her prior supervisory, human resources and financial management experience:

I was working at a much higher level than was expected really and within 2 years a bursar's job came up, not too far away and I applied for that and got it. So that was in 1995 and within 18 months I had become the school business manager.

This was over 20 years ago when the SBM role was still relatively unknown and she credits her elevation to the position at such an early stage to a forward-thinking head teacher whom she worked for at this time and who could see the way the school system was headed organisationally and the potential of the SBM role. She stayed in this role for the next seven years, establishing systems and procedures to ensure it was operating efficiently and effectively before moving to another SBM role in a different school for new challenge, where she remained for a further eight years. She had intended to finish her career at this school, but when her current position was advertised she decided to apply:

This job was advertised in summer 5 years last August and I suddenly felt inclined to apply for it … I knew the school was planning on going down the academy route and they needed an experienced SBM to be able to see them through that process, so I started in November 2010 and we became an academy in May '11.

Participant G has also completed a number of qualifications throughout her career, including a Higher National Certificate (HNC) in business, the DSBM and the CIPFA Certificate in Financial Reporting for Academies. She singles out the diploma as particularly helpful in her development as an SBM: '*I'd been working in schools a long time and thought I was pretty clued up and decided well I'll go for the DSBM … I actually came out of it feeling that I had developed and I had sort of got a different outlook when I came out, I had always tended to think only of the business side of things and there was that realisation that everything has got to have an impact on outcomes for pupils.*' Participant G intends to retire from work next year to spend more time with her family, though she will continue her work with the regional SBM group that she chairs and coordinates and thus continue to contribute to the profession.

Role composition and responsibility

Participant G's role is a strategic one with overarching responsibility for academy finance and business, including human resources, buildings and premises and health and safety. As such, she line manages a number of staff within her teams, including a finance assistant, finance officer, an HR and payroll officer, site manager, catering manager and administration manager. She also manages the finances for the Teaching School and SCITT. Participant G is a full member of the senior leadership team at Crooksville. As the only support staff member, this can be challenging with some senior staff members dismissive of the importance of the role:

I'm used to feeling like a bit of an outsider and I think the role in schools for the SBM is probably the most unpopular one because I think they see that as me being a killjoy. But what they don't realise is by managing the resources properly it contributes to the resources that they've got, it contributes to the outcomes.

Indeed, she contends that one of the most difficult aspects of her job is communicating to teaching staff the importance of complying with systems and procedures for finance and resourcing, particularly since they converted to academy status: *'trying to get the message across that it's absolutely crucial that we do what we do properly because we are accountable … we are spending public funds, we have systems that we need to follow to ensure that we get best value, I think that's the hardest thing really.'* However, she has the full support of the principal and chair of governors, both of whom understand the importance of the SBM function given the fact that Crooksville is essentially a medium-sized business with an annual turnover of over £8 million. Indeed, she suggests that it tends to be the aspiring head teachers who show the most interest in and engagement with the SBM function: *'because they can see it is an essential part of what will be their future role.'*

Having worked in the school for five years now, she reflects on the differences in the role between life in an academy and a local authority maintained school:

I think pre-academisation there was much more reliance on, and support from, the local authority, some of which I've missed in a way because obviously the buck stops with you, you know, we're a small-to-medium enterprise now, we're a company.

She admits that in her previous role as an SBM in a maintained school she never felt compelled to buy services and support from the local authority, though she also suggests the landscape has shifted since the system has become more academised, with services and suppliers now charging more than they previously had. However, she also has the flexibility to 'shop around' and find the best value for the school. Moreover, as she explains, there has been a change in mindset for schools that have converted: *'I know what used to happen in the past is that schools used to go into deficit and expect the local authority to bail them out … this is a business and it's got to be viable and I think people, teaching staff, are becoming more and more aware of that.'* In this sense, the school finances are more important than ever before, not only because of the devolved nature of the budgets but also their size: *'Yes, obviously we want to provide the best educational experience for our pupils but we've got to be able to afford it and I think the culture and the awareness of that is getting more apparent now, thankfully … we've got, like I say, an £8.5 million budget to manage and we've got to get everything out of that and if the income doesn't match the expenditure then it can't be done.'* So despite the stubborn resistance to the SBM role and its purpose and potential that participant G has been met with from some members of the school workforce, she is confident that there is a cultural shift occurring within the wider system and the school community is slowly beginning to understand the implications of the significant structural reforms we have witnessed in recent years.

Professional identity

From a personal perspective, she is quick to highlight the passion and fervour she retains for her work: *'it's not a job to me, I don't just come to work and go home and forget about it, you know, this is something that I put my heart and soul into.'* This attitude towards her role has been crucial in helping her build and retain credibility amongst her colleagues throughout her career:

I think my credibility came with me. The principal here had actually worked at my school before last … she knew my capability and my reputation came before me … I think a lot of the professionalism has got to be in how you conduct yourself, so if you display leadership qualities and you act in a professional manner with complete integrity then that certainly helps in the recognition of you being a professional.

More broadly, she cites the development of the SBM professional standards as an important factor in the growing recognition of the role across the system. Indeed, she presented the standards to the principal at Crooksville who took a copy as a means of developing the job description for participant G's successor when she retires. As she explains, this also served to highlight the scope and volume of her responsibilities: *"she's read those and thought, 'you know, that's what we need to be looking at' and has accepted that it is a profession and in actual fact she's said to me 'we need two people to replace you!'"*

Participant G is generally positive about the health and prospects of the profession and unlike many of the participants who were interviewed for this study, she believes there is a growing number of aspiring SBMs waiting in the wings: *'I think there's definite aspirations these days … I lead the regional group of SBMs and I'm always getting requests from people who would like to get into school business management.'* This is encouraging and emphasises the importance of networking and collaboration for the profession, something participant G was only too aware of when, in 2009, upon being elected to the NASBM board of trustees, she set up a regional school business management group. They originally had 45 members but that number has since grown

to over 300. She still chairs and coordinates this group (alongside two other co-directors) and, as highlighted earlier, intends to continue in this role after her retirement. Whilst they charge a subscription fee, this is discounted from their NASBM annual fee and allows members to attend the three conferences a year that the group organise with keynote speakers and workshops. They also generate income through sponsorship and exhibitors at these conferences. These opportunities for professional collaboration are really important for SBMs, particularly given the relative isolation for some incumbents of the role: 'people really value being able to talk to their peers and we might come up with a discussion topic and say "talk to each other about how you do this" and they just have table top discussions and, you know, that's really useful for them.' The group also collaborate over procurement for services and products for their respective schools allowing them to take advantage of economies of scale. In addition to this regional SBM association, there is a local group for SBMs who work in academies that participant G attends. However, while useful for academy-specific issues, this group is currently less established, with meetings being more sporadic.

Given her impending retirement, the issue of succession planning is clearly on the agenda at Crooksville, where they recently recruited an assistant SBM to develop from within. While this is an interim measure and the Director of Business and Finance position will be advertised externally, the idea is that they can at least position this new recruit to support the transition and hopefully be able to develop into a more senior SBM position herself in the future. They are also planning on a crossover period between participant G and the new post holder:

Jenny [assistant SBM] having started with us … that's sort of an interim measure, obviously we will be looking for a replacement for me, but she's learning more of my job to be able to see us through and to have some continuity, pending the appointment of somebody new. And the person that we appoint, we intend to appoint 2 months before I leave anyway, so that we can work together.

The consultation of the outgoing SBM regarding the scope of their role and the kind of candidate they should be looking for as a replacement is a smart move considering the often diverse and voluminous nature of the SBM workload and responsibility. This practice, according to participant G, is really important to ensure the smooth continuation of the SBM function: 'sometimes professional people within the teaching profession or within education think that they know what they need when they probably don't.' For example, in addition to the underlying financial knowledge, she underscores the importance of leadership and management qualities to the role, as she explains: 'budgeting I suppose is the one thing and that is the crucial thing, but I think leadership qualities, that's what you're looking for, you couldn't have anybody who didn't know how to manage people.' However, in participant G's opinion, one of the key dispositions required for SBMs is school-based experience and an understanding of the many nuances of the education system. In the current climate, where many academies and multi-academy trusts (MATs) are appointing individuals with specialist finance and accountancy skills often from outside of the sector, she believes the value of such experience in schools is often overlooked:

They [MATs] are smaller local authorities effectively aren't they? And I think the concern about that the SBM role might disappear in some of the smaller schools … somebody is at a much higher level in the hub of the MAT whereas the others could disappear, be downgraded, lose their responsibilities. That is a concern I think.

The growing number of MATs and the means by which such structural changes are shaping the profession is, according to participant G, a growing issue for SBMs, particularly those working in maintained schools who are perhaps not fully prepared for the transition to academy status should that happen. She believes this points to a larger concern regarding the appetite amongst many serving SBMs to develop their skills and adapt to the changes within the system:

I would say that many of the maintained schools within my area are unaware and unconcerned about what's going on outside. I think that some of them may not have the skills, knowledge and experience to look ahead and see what might be coming.

If the profession is to continue to grow and remain purposeful and relevant within the school system, then it requires its members to take responsibility for their own skills and knowledge to ensure it continues to be relevant. This, contends participant G, is a cornerstone of what it means to be a professional.

Appendix 8: Bridge Cross School

Context

Participant H is the Development Director for School, Business and Finance at Bridge Cross School, a larger-than-average secondary school with capacity for around 1200 students aged between 11 and 16 (though at the time of the interview the school was undersubscribed with just over 800 students). The proportion of these students eligible for Pupil Premium funding is above the national average, while the number of students with a disability and those with a statement of special educational need is below the national average. In the school's latest Ofsted inspection, it was deemed to be 'good':
'*the quality of leadership and management from senior leaders and governors is good. They have a clear view of how successful the school can be and demonstrate a clear commitment to raising standards further*' (Ofsted, 2013, p.1). Bridge Cross is a member of a regional consortium of schools and is maintained by the local authority.

Professional background

Following his undergraduate degree in geography, participant H had planned a career in countryside management. However, he had a change of heart and enrolled on to a graduate training programme in sales recruitment where he remained for five years before moving to another graduate training programme, this time for a local authority where he worked in corporate services and also spent a year in the education department. It was during this time working across a range of areas across education, including student data analysis and health education, that he gleaned valuable knowledge that would be relevant for his future role as an SBM:

I was like deputy manager of a team, so I managed like the Healthy Schools programme, we did sex education, drug education so in terms of like the pastoral kind of background … and so everything to do with that side of business management as well as the data and information side.

However, before moving into school business management, he changed careers once more, spending a year working with an IT consultancy company that worked with schools on technology. When this company went into administration, he began searching for a new job and saw his current post advertised. Given his skill set and experiences, he felt he was in a strong position to apply:

I just kind of saw it advertised and thought well I've got knowledge of information systems, I've got knowledge of HR, finance, of food and dining and obviously, with my degree, I had knowledge of premises and landscaping and so … I just felt it was a good fit for my background really.

His predecessor had occupied the role for around 20 years and worked her way up from a clerical position in the school office to become the bursar and then SBM, a title that was conferred on the role three years before participant H began. He has since been in the role for eight years.

In addition to his undergraduate degree, participant H also has a Master's in Business Administration (MBA) and has completed the CIPFA Certificate in Financial Reporting for Academies.

Role composition and responsibility

Participant H's role encompasses five key areas of the school: finance, IT, human resources (HR), administration and premises. His role is predominantly strategic involving short-, medium- and long-term planning for improvements to facilities, buildings and premises and to ensure they are fit for purpose and suitable for student needs. So, for example he has developed a five-year plan to improve the catering facility and has led on the development of the administration processes, including introducing iPads for all staff. The management of the school budget both long-term and operationally is also a key focus, for instance ensuring it balances on a weekly basis and that the school can accommodate the fluctuations in student numbers they have seen in recent years. He is also involved in staff interviews, appointments, restructuring, redundancies and dismissals from an HR perspective. Given the scope of his role and the range of responsibilities associated with the position, he manages quite a large team of staff who support him in his work. This includes a manager and deputy manager of premises, two caretakers, a network manager and technician and then small teams of support staff for finance, administration and HR. The school outsources their catering and cleaning, though participant H has an oversight of this.

While he enjoys his job, he does acknowledge the intense and continuous nature of the workload, as he explains: 'it's the amount of workload, but it is the pace of it, *it's just constant and you can never ever finish the work you've got … you're kind*

of constantly on that treadmill, there's never an endpoint.' One of the aspects of the role that he would like to change is the type of work in which he is engaged. Though his role is a senior one with strategic oversight of the organisational management of the school, he does find himself drawn into the day-to-day operations. This can be distracting and frustrating:

Ideally I want to be just doing this, all the strategic stuff and pass everything else down, but in reality we don't have that staffing, so as a result I … have to keep doing some operational stuff and that makes it hard because you're not able to give 100% to anything.

Nevertheless, he does enjoy a relatively high status at Bridge Cross as a full member of the senior leadership team, with his position set at the equivalent level of an assistant head teacher.

In terms of succession planning for his role, the school has recently appointed an apprentice from the retail sector to work with participant H. He plans to meet with the new recruit at some point and explain some of the potential options and routes that are available in terms of a career in school business management. However, he contends that he currently has no natural successor and, given the scope of his role, this is a slight concern, as he suggests: *'if I was knocked down by a bus tomorrow, there'd be lots of things that wouldn't get done and no one in school would kind of know how to do some of the stuff … we haven't got that succession planning and part of that is because of the time and the staffing that we've got, we don't have the time to train up people in all the different aspects.'*

Another significant impact on the SBM function at Bridge Cross has been the decline of the local authority, which has seen considerable reductions in capacity, impacting directly on the work of participant H and his team:

It's changed a lot … there was a team of school advisors, about 40, and then loads of different staff that would come in and support us. Whereas now, that support isn't there any more, so there's literally no advisors, the team I used to deputy manage doesn't exist anymore. We do monthly returns to them and we still buy into the local authority HR and payroll systems … other than that, all the other contractors and suppliers we get are the same kind of negotiations we'd have as an academy.

Indeed, Bridge Cross tend to rely more on inter-school collaboration for educational support rather than the local authority, such has been the reduction in the services and provision they can offer. So, despite being a maintained school, they are essentially operating both organisationally and educationally as an academy. As yet, they have no plans to convert, though there is a sense that this may happen in the near future, as participant H contends: *'we did the research before, we put a lot of things in place to convert because the governors had approved it, but then the change of head teacher has just put it on the back burner. I think particularly from a finance point of view we're shifting more towards that … in anticipation of us converting.'*

According to participant H, the school is much more business-minded in its operations than it used to be, both because of the systemic shift to organisational and financial autonomy but also due to the perspective that he himself has brought to the role given his previous professional experience. However, as participant H keenly points out, education must always remain at the forefront of any decisions made, such is the nature of working in a school. He draws on the improvements to IT provision by way of example:

I can go and say "here's this proposal for getting iPads for every student" and present the case for that, but I've got to present an education case for it as well as a business case. So the business case is … buying iPads for all kids but saving money, will reduce paper costs, increase efficiency, administrative time will reduce; we'll be producing fewer materials, etc. So there's a clear business case for it, but I've also got to present an education case for it and that is that students will have access to learning materials 24/7.

This is a common perspective across the sample of SBMs within this study; despite their role to increase efficiency and savings and ensure their respective schools are providing best value for the money they receive, the students' educational experience remains the top priority.

Professional identity

As is typical of many SBMs, particularly those who have either been the first incumbent of the role or been in position for a number of years through which the profession has evolved, participant H has had to work on building credibility across the school. His membership of the senior leadership team has enabled these colleagues to understand the nature and scope of his role at Bridge Cross, whereas across the wider school he has relied more on leading by example and demonstrating his worth through tangible impact:

I think colleagues across the school do recognise what's involved in it [SBM role] … I lead on technology and I think they were able to see significant changes in a relatively short period of time, so I think by making those changes and leading on it, visibly, I think they were able to recognise the difference that you're making, whereas I think if I'd come in and just carried on doing things in exactly the same way I don't know whether they would have seen it as an SBM as such. I think they might have just seen it as a bursar really.

He acknowledges the support he received from the head teacher who was in place when he started in the role was invaluable in raising his profile, particularly given the level of autonomy and professional space he was afforded by this individual who was a keen advocate of the SBM role. As participant H explains: '*I had a lot of autonomy for things like budget, in terms of bringing changes in with technology and the premises which helped a lot and he did put that trust in me … and I think as a result that gave me more appreciation and recognition of what I was doing as a professional, as a school business manager.*' As a result of this, he is now well established at Bridge Cross and staff members mostly understand what his role encompasses and will come to see him with relevant issues and queries regarding his area of responsibility.

On a broader scale, participant H is more sceptical regarding the recognition of the profession and believes there remains work to be done to raise the status of SBMs across the system, specifically around the status, influence and responsibilities that can accompany the role:

If someone was to say to me "right, you're going to be managing a £5-6million budget, there's 120 staff, you might be using building investments of £500 to £1 million every year." When you look at that list of opportunities, they're vast … I think there's more could be done to promote it because I think the view is, certainly in primary schools, it's a lady on reception who's looking after kids, wiping their noses and collecting a bit of dinner money and that still can be the perception sometimes.

However, he also acknowledges the progress made by organisations such as NASBM in helping to address this issue, whilst his own local authority have relatively recently changed their pay grading structures to accommodate SBMs who are working at a higher level. As he explains: '*schools have now got the option to look at what the role is and to choose a job profile to suit and that's something we did discuss quite a lot with the local authority to kind of get that recognition.*' This is important, according to participant H, because of the wide disparity between SBM roles across schools, an issue that has also been addressed to a certain extent by the introduction of the SBM professional standards against which schools can map their business management function to gauge the level at which their SBM is operating in terms of responsibility.

Participant H is a member of a number of professional networks, including a local authority efficiency group which includes three other SBMs and a head teacher from the local area, that meet regularly to discuss ways of finding savings across the borough in terms of purchasing and contracts. There is also a group of five SBMs from the cluster of schools to which Bridge Cross belongs who meet every half-term to discuss issues and share best practice and again take advantage of economies of scale. Though these groups are informal in their arrangements, they allow the SBMs to engage in professional collaboration and dialogue. This is important in terms of their professional identity. Moreover, for participant H, his involvement in such collaborative activity and peer support is an essential facet of his responsibility to the profession, as he contends: '*I'm thinking "this could be the career that I stay in for the rest of my life" and I do feel I could contribute to this as a profession and help other schools. It's like I've invited primary school business managers if they want to come here for meetings, that's something I do think I can add and help promote it really and raise the profile a bit.*'

His long-term career aspirations include leading the business management of a larger number of schools, potentially a multi-academy trust (MAT), viewing this as the natural next step from his current position in a large secondary school: '*I just like the idea of managing a number of schools and that's the only kind of career path you'd go down.*' Related to this is the notion of succession planning for SBMs, where he suggests there may be a paucity of similar ambition within the wider school system (possibly as a result of the age profile of many incumbents of the role) that may be holding back the profession:

I think the challenge for a lot of schools is the ageing nature and the personality of the people doing the admin tasks, they're quite happy doing what they're doing, don't really want or have career aspirations, so it is hard … the level of pay for a lot of the admin tasks isn't probably enough to entice people in.

As he suggests, it might require a shift in job titles to address the disparity of roles in the system and facilitate an influx of aspiring SBMs: '*you could use a professional standard, say 'trainee business manager', and then you could start them with admin tasks, train them up in the different offices and then get them up to a deputy SBM over the course of the years.*'

Appendix 9: Hilltop Collaboration

Context

Participant L is the designated Business Manager and Strategic Director for the Hilltop Collaboration, a Teaching School Alliance (TSA) of 9 schools situated around the perimeter of a large city in the north of the country. The alliance is led jointly by Standage Road Primary School and Saltman Primary School, both of which are designated National Teaching Schools. As both schools are situated in close proximity, they serve the same multicultural community, which is around a third white British with the remainder encompassing a range of ethnic and cultural backgrounds, the largest of which is Pakistani. The pupil intake is therefore reflective of this community, whilst the proportion of students with a special educational need and those registered as disabled is below the national average for both schools. The other nine schools within the collaboration cover a wider geographical area and a broader range of socio-economic contexts. In addition, the member schools are at different stages of the school improvement trajectory with a range of Ofsted categorisations. The group have a strong history of collaboration that predates the development of the TSA, having previously worked together as a cluster and on a range of different partnership projects in the past. Standage Road has recently converted to academy status; the likelihood is that Saltman will follow suit in the near future.

Professional background

Participant L began working part-time as a secretary in a small school in 1996, a role she remained in for six years before moving to a secondary school as a finance officer, where she remained for two years. She then gained a promotion to become the examinations and data officer before gaining further promotions to eventually become the SBM. When the school was placed into special measures and converted to an academy, she took a career break to travel before returning to work as a part-time SBM in a different school, after which she applied for her current position working across a group of schools. The role interested her because it was removed from her previous positions working in single schools, as she explains:
'I think the reason for this one is it was different, it was being an SBM but I'd sort of done that … so this was across 9 schools, so more of a collective.' Indeed, she credits the head teachers within the collaboration for their strategic thinking regarding the changes within the sector and the growing notion of a school-led system with groups of schools increasingly working in partnership. As such, a coordinating organisational management role was conceived of to facilitate the inter-school collaboration:

I think they saw it coming and thought this would be a really good role to develop because they were getting to that stage where they couldn't do things they wanted to do because of their day jobs, so they needed somebody to get it together really and I always think of myself as the glue that holds things, you know, the pivot person … not having the authority of a head, but having enough authority that you can make decisions and get people to work together, very much a collaboration partnership.

Participant L does not hold any of the specialist SBM diplomas; rather, she studied for an undergraduate degree believing this to be of more interest and benefit to her.

Role composition and responsibility

The nature of participant L's role, working across a number of schools in a shared capacity, means the composition of her responsibilities is slightly different to what would typically be expected of an SBM. In fact, all the other schools within the collaboration have their own SBM or at least a staff member who fulfils that function within each setting. Participant L's role then is much more focused on strategic planning for the group and facilitating collaboration:

I make sure that relationships are nurtured, they can soon drop off, it's really key that if you're working with people that they all feel informed, they all feel consulted … we've got nine heads now, we've formed the Teaching School Alliance Board, so those nine schools have got a set of protocols, an agreement of how they work together, but I make that happen. It sounds very administrative but if you didn't have it, nothing happens.

In addition to the formal and administrative responsibilities, participant L coordinates different avenues for the group for the schools to work together, including shared professional development activities such as conferences with guest speakers and staff training:

Last year we did Singapore maths, that's the big thing across the TSA, so I organised all the staff in all our schools [to have] bar model training. So that was economic, cost-effective and everybody got CPD at the same level, so we used another Teaching School to deliver that, we didn't go to an outside consultant. So those are the things that I can make happen.

She also ensures the group is operating consistently and efficiently in terms of organisational management. For instance, she hosts regular network meetings for SBMs to share information and best practice and discuss any issues and concerns. For example, in a recent meeting they undertook a health and safety audit to ensure all schools in the group were working under the correct systems and procedures and therefore fulfilling their legal obligations. Other areas of provision are also covered in these meetings:

Other things we do are like benchmarking … so we can see across our schools what we're paying for staff. There's quite a lot of benchmarking that can be done on services, products, procurement, so we do that once a year, where we all pool our information. So those are the things that I tend to look after, run and get impact from rather than actually in the school being business manager.

While her role is quite removed from the financial management of the individual schools within the collaboration, she is responsible for the TSA business plan and for generating income for the group as a whole, through grant applications and the brokering of services the alliance provides, as she explains: '*recently I ran a course where we did effective classroom observation, I offered it to high schools and we made a surplus of £5,000 … that money goes into a central pot for all our 9 schools and then they decide as a board how they're going to spend it.*' She also ensures she generates enough money each year to cover her annual salary to ensure her role is cost-neutral at the very least. So the role is quite business-oriented in scope, with a real focus on finding ways to increase income for the TSA and create a sustainable financial model, as this example illustrates: '*we're starting to work with more business partners, we've just linked up with an IT company and they're offering different things … maybe we can work with them to develop technology in certain areas, not only for our pupils but courses that we can sell.*' Ventures like this are potentially important given the reliance the TSA has on central funding from the Department of Education that may not continue in the future.

Professional identity

According to participant L, the status of the SBM role across the system needs to be raised more, with many incumbents having found themselves in the role as a second career or (initially at least) as a part-time option. As such, the position is not necessarily viewed as professionally as it should be: '*The reason I took my job was because it fitted in with my children … I was working 10 hours a week when I first set off and then it just grows and I bet there's hundreds of us like that, but maybe that might change with the next generation. Maybe as the status does grow that will start to change.*' She also suggests that there remains a lack of understanding of the role across certain areas of the school system and a creeping notion that individuals such as qualified accountants and financial specialists are valued more than SBMs, particularly in the secondary school sector.

I work with many different heads and with a range of organisations and their perception is sometimes that I'm a school secretary. There is this hierarchical thing that still exists … I'm not taken seriously! I'm very fortunate to work with a lot of heads who actually get it, that they know I have value, but I still come across it with a lot of heads in secondary schools who may see value in having an accountant or finance director but don't see that same value in an SBM.

Indeed, she cites examples from schools she has worked with where the SBM has changed their title to Finance Director despite not having any accountancy qualifications and then bought in accountants to check and sign off the budget. Conversely, she knows of accountants who have entered the profession and are struggling with the SBM role because of a lack of school-based knowledge. Other schools have created new spaces to accommodate both roles: '*I've just done a piece of work with an academy trust that has said, "we still want our SBM, but we want somebody else to be a finance director as well." So they've created a new role, literally just to take care of the figures.*' According to participant L, this diversification is a direct result of academisation and the added pressures head teachers and governing bodies are now under in relation to financial accountability:

Many head teachers I know have gone down that business route … they've employed an accountant, they're not so concerned about the school stuff because they're so worried about that accountancy role and the scrutiny that you come under with academy conversion.

In this sense, the SBM role is narrowing and becoming fragmented with some incumbents focusing solely on the financial aspects of the role or relinquishing this responsibility to a specialist and turning their attention to the organisational and operational management of the school. Despite these shifts in the kind of work SBMs are expected to undertake and the infiltration of their professional territory from individuals from other sectors with specialist qualifications, participant L does believe schools need to be more business-oriented in the way they operate: '*I do think we need to be more efficient and I do think there are some heads who don't look at it to make it as efficient as it could be … I think it's down to systems and procedures and strategic thinking projecting forward.*'

In terms of succession planning, Hilltop have a focused recruitment strategy for SBMs across the collaboration that stipulates a minimum level of qualification for new staff members and a programme of training for existing colleagues to ensure they have the necessary skills for the role, as she explains: '*we have tried to train everybody in CSBM, whatever level they've come in at … I think two colleagues have already moved on and they've been good promotions so we feel that we are training them well.*' This commitment to support and develop the next generation of SBMs from within their group of schools and also recruit qualified individuals indicates the consensus across the group regarding the importance of the role and a strategic goal towards self-sustainability from an organisational and financial perspective.

Appendix 10: Thornley School

Context

Participant M is the Bursar at Thornley School, a medium-sized secondary grammar school with sixth form situated in a rural city to the south of the country. This is an all-boys school catering for students between the ages of 11 and 18. It currently has just over 800 students on roll, predominantly of white British heritage. It is also Church of England affiliated and regularly amongst the top-performing schools in the country in relation to student outcomes. The last Ofsted inspection in 2008 deemed Thornley to be 'outstanding'. Thornley converted to academy status in 2011, though it is not currently a member of a multi-academy trust (MAT) and has no plans to be.

Professional background

Having previously trained as an accountant in private practice, participant M ended his time in the armed forces qualifying with the Chartered Institute of Management Accountants (CIMA). He spent much of his career in the Army - 25 years in total - working across a number of divisions and areas including the strategic apex, where he was responsible for costing resources and spending in relation to manning, activity, infrastructure, equipment, etc. As his career in the army was coming to a close, his current role was advertised and seemed a suitable fit for his financial acumen and organisational skills:

The benefit of the Armed Forces is you're used to dealing with lots of people and managing problems that are multi-faceted and managing issues on a matrix basis and you're used to having to work through things to find a solution … I'm reasonably unique because I've got that skill set but I'm also an accountant, so I don't have to defer to anyone else on that, I can get to the costs with fairly good fidelity.

He has been in the role for three years now and has already overseen some key changes to the school, not least the school budget, which was in poor health when he arrived. According to participant M, this necessitated a shift in the mindset of some staff members: 'I arrived and there was probably a lot of complacency and people very set in their ways and meanwhile the funding figures were going down … I arrived not realising just how precipitous the funding reductions were.' Following a detailed assessment of the situation, he advised the governors on a potential strategic plan that concurred with a wider organisational and curriculum restructure to ensure the school's financial viability:

The bottom line is I had to unearth every cost in the school and then put together a set of options to governors and package them up into palatable amounts and actually that coincided with rethinking about the curriculum … There are certain curriculum areas that we chose to step away from so without trying to be too euphemistic, there were going to be redundancies; that's what's happened.

The school had also recently converted to academy status shortly before participant M was appointed. As such, there have been considerable shifts in the means by which the school is financed and managed as they have adjusted to life outside of the local authority control. Culturally, this has been a steep learning curve as he contends: 'we're actually flying solo, there's no one who bails us out here, "there's your funding and you have to live with it and if we haven't got reserves in the bank then we can't pay salaries." That's how desperate it could be unless we're ready for this. So it's been quite a significant learning period.' As a result of these budgetary constraints and the structural changes the school had undergone, the early period of his role was a difficult one for participant M, who admits: 'I probably lost sleep over the budget … when you're handed a budget that doesn't balance and you've got no alternative but to balance it and no one is giving you advice on how to do it and no one wants to offer up compensating reductions that they can think of in their area … that was a challenge.'

Role composition and responsibility

His official title is that of the traditional school bursar rather than SBM, in accordance with the governors' request that they appoint an individual with a strategic outlook who would not only manage the finances and resources but also identify and negotiate organisational challenges and issues. Having taken up his post, he was appointed as a full member of the senior leadership team alongside the head teacher, deputy head teacher, two assistant head teachers and three pastoral head teachers. His role is fairly typical of an SBM, encompassing overarching responsibility for budgetary planning and financial management, buildings and premises, maintenance, human resources (HR), administration and catering, and often combines both the operational and strategic: 'I can go from sorting out doors off hinges and locked toilets to sorting out a £5 million budget.' However, he does have small finance, HR, site, catering and administration teams that he lines manages and who support him in the organisational management function. Participant M is appreciative of the level of support he receives in his role:

I'm definitely supported by governors and by the head and I feel very comfortable within the leadership environment … we've got a great catering team, we've got a great site team, we've got the girls in the finance office and all will work hard and do what they need to do and they will switch priorities if I say "can you have a look at this?" So, at every level I feel like I'm nicely covered.

Moreover, the working relationships and dynamic he has established within and across these teams of support staff have been central to the smooth operation of the school management function and an area of the role he takes very seriously, particularly given the overlapping nature of the responsibilities amongst the various teams he manages, as he explains: 'people test each other and work out where the boundaries are … I was just chatting to our site manager, I trust him, he knows when he needs to come to me and I know when I need to go to him, same with catering.' Yet, despite the support he receives from these staff members and their respective teams, he still finds himself overworked at times and voices concerns over the volume and diversity of his workload:

Where it is dangerous and if you're the sort of personality who tries to resolve problems you become very, very relied on and that's something I've got to work on because I do spread myself very thin at times.

This is a common issue amongst SBMs, many of whom have an incredibly diverse portfolio of responsibilities in their role and an almost limitless remit in terms of what they might be expected to do on any given day. The nature of schools as necessarily unpredictable and chaotic organisations in which the SBM is often trying to bring some semblance of order and stability is also a key factor here.

Professional identity

Participant M acknowledges that whilst the skill set and experiences he accumulated in his previous role in the Armed Forces positioned him well for his current role, the transition into the school sector took time to adjust to. In particular he highlights the somewhat insular culture of schools:

I had to back myself to come into an environment I knew very little about. Some of the behaviours were very different to what I was used to, you know? People make assumptions about your own background, but for example, in the army I wouldn't walk past someone without saying 'hello, morning, how are you?' There's a very different social dynamic here. There's a bit of a staffroom ethos, you know, where people don't open up and let new people in, they sort of sit in their groups.

In addition, it took time for his role to be fully accepted across the school given the financial cuts he was charged with implementing and the fact that he was a new member of staff and the only non-teaching member of the senior leadership team, meaning his credibility and status within the school were underdeveloped. As he explains: '*I found in my first year when it was my turn to brief a staff meeting … the reception could be quite hostile at times, I was almost seen as an agent of central government delivering austerity.*' Even today, he feels staff members do not universally understand his role in its entirety, with some perhaps adopting a more traditional perspective of the bursar as in a position of service and subordination to the teaching staff rather than a position of influence in relation to the financial and organisational management of the school: '*They* [staff] *probably don't always understand my role because they'll view me from their standpoint, you know, what can I do for them rather than what am I doing for the school. And I don't think they understand the nature of having to make hard choices between different things.*' Yet, while there may be work to do to raise the profile and develop more of an understanding of his role at Thornley, particularly in the context of academisation and the shift from being a local authority maintained school, participant M does accept that different cohorts within the school workforce tend to operate in relative isolation at times and this is necessary in order for individuals to fulfil their core responsibilities.

More broadly, he contends that the profession remains undervalued and misunderstood because of the way SBMs are often (mis)associated with the term 'business' in the corporate sense with notions of income generation, whereas school business management ought to be understood in terms of efficiency, savings and reinvestment for the benefit of the student experience, as he suggests: '*the problem with the word 'business' is people associate it with profit. We associate it with efficient delivery of output and that's the context in which it is used … but actually if you can produce some surplus at the end then you can reinvest that in infrastructure.*' On a personal level, participant M addresses this issue through his professional approach to a role he views as requiring the same attention-to-detail commitment to the job as any other profession. He draws on the nature of the workload by way of example:

And I see it as a professional role within the school … I think we all understand one of the things when you're a professional is you don't observe official hours of work, rather you work the hours you need to work to get the job done. For example, I'm trying to get a capital improvement funding bid in by midday Wednesday so I was in all day Saturday and I'll be on it late tonight and probably tomorrow until I can hit 'submit' and I don't sort of go "look, I'm logging my extra hours!", I just accept that's part of being a bursar.

He also belongs to a number of professional SBM networks, including one group that is specifically for bursars working in academic state schools for boys. This group is a particularly useful resource, as the fellow members provide him with a meaningful benchmark for his own role at Thornley, as he explains: '*their issues and problems will very much mirror mine and their budget constraints, their demographics will look like mine.*' In general, he describes the wider school business management community as '*very supportive and friendly*' which is important to participant M and his SBM peers given the often isolated and lonely nature of their role; professional networks give incumbents a sense of professional belonging in addition to important sources of support and guidance.

Unlike many of the SBMs within this study, participant M believes the diversity within the SBM community in terms of the wide range of career trajectories of incumbents of the role is a good sign and indicative of the health of the profession rather than any fragmentation. Indeed, he contends that individuals who have entered the profession from other sectors might actually be in a better position to adapt to the complexities of an ever-changing school system driven by a turbulent educational policy climate:

When I attend a network meeting of SBMs, the room will divide broadly into people with a more strategic outlook who've come from somewhere else and those who have sort of come up as school administrators. But when I look, there are people from accountancy, from the forces, from business and I would say, the more dynamic of that bunch are the ones who come in as a second career. They just see it from a very different perspective.

Related to this is the acknowledgment that the role still tends to be one that individuals arrive at as a second career choice or through happenstance rather than any aspiration or strategic goal. As he contends: '*there will be boys in this school who want to go into third sector, but they wouldn't think of coming into a school as a business manager.*' This reaffirms the idea that there is work to be done to raise the profile of school business management as an interesting, purposeful and viable career option.