LEADING LEARNING: HEADTEACHER PERSPECTIVES ON THEIR PROFESSIONAL ROLE AND IMPACTS OF THE NEWLY ‘PROFESSIONALISED’ SBM

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ABSTRACT

School leadership is recognised as being highly significant for student learning, and yet increased workload and complexity associated with school leadership are believed to be in part responsible for current difficulties internationally in recruiting and retaining suitable headteachers. In recognition of the demands being placed on school leaders, since 2002 the government in England has attempted to ‘professionalise’ an historically disparate and fragmented section of the education workforce under the title of ‘School Business Manager’ (SBM). Policy makers believed that this group would be especially well-placed to reduce the financial and administrative workload of headteachers and thus support their succession. This paper presents evidence in relation to this policy, drawing on headteacher perceptions of their professional role and the impact of SBMs on their working lives. It arises from research on a national initiative in which groups of schools were tasked with devising ways of sharing business management expertise. Though barriers to the idea remain, the findings of this study suggest that the professional expertise of SBMs can offer one means of enhancing self-perceptions of confidence, job satisfaction and effectiveness among headteachers in English schools, and thus of supporting headteacher recruitment and retention.

KEY WORDS

Professionalism
School Business Management
Headteacher recruitment and retention
Educational leadership
School support staff

INTRODUCTION

The neo-liberal agenda for economic and social policy has been adopted by many nation states to secure competitive economic advantage within an increasingly global marketplace (Chitty 2009; Levin 2004; Torres 2009). Globalisation is challenging existing ways of providing public services and the role of the public sector professional, giving rise to scholarly debate around professional identity and what it means to be a professional within the public sector (Beck 2008; Evans 2008; Day and Smethem 2009; Edmond and Price 2009; Swann, McIntyre, Pell, Hargreaves and Cunningham 2010; Bottery 2007; Osgood 2009; Cooke, 2006). Within education, the last 20 years have seen an unprecedented level of state-mandated change in the education sector in England (Gibton 2004). Curricular and structural
changes have impacted very significantly on relationships within the school community and beyond (Butt and Gunter, 2005).

Increasing demands have been made on headteachers by trends such as the devolution of management to individual schools; the growing quantity and sophistication of data implied by the education quasi-market; increased numbers of support staff through workforce reforms and the expectation that schools will work with other agencies to provide services beyond basic education and outside traditional school hours. After teaching, school leadership is understood to be a key influence on student learning (Printy 2010; Leithwood, Day, Sammons, Harris, and Hopkins 2006; McBeath 1998) and yet increased workload and complexity associated with school leadership are believed to be in part responsible for current difficulties internationally in recruiting and retaining suitable headteachers (Whitaker 2003). This paper explores ways in which professional school business managers (SBMs) in one study in England are impacting on headteachers’ perceptions of their own professional role as educational leaders.

In 2001, a government commissioned report found that headteachers in England had seen their workloads increase more significantly than many other professionals and underscored the potential of suitably qualified SBMs to take over some of the increasing number of administrative and financial tasks from educational leaders (PricewaterhouseCoopers, 2001). Largely in response to this report, since then the government in England has made concerted efforts to ‘professionalise’ an historically disparate and fragmented section of the education workforce involved in school finance and administration (Wood et al. 2007; Woods 2009). At the request of the then Secretary of State for Education and Skills, Estelle Morris, in 2001 the National College1 launched the first of a suite of nationwide programmes for SBMs. These would offer a means of recruiting, developing and accrediting SBMs and of providing a clear career pathway for the profession. In addition to these programmes, the National College has since collaborated with organisations such as the National Association of School Business Managers (NASBM) and the Training and Development Agency for Schools (TDA) to put school business management on a firmer professional footing and to raise the profile of SBMs. According to National College projections, demand for SBMs is increasing and there may ultimately be around 13,000 posts nationwide (Summerson 2009).

Some recent work suggests that SBMs in England are beginning to play a more central part in their schools (eg Aldridge 2008; NCSL 2009). The development of the SBM role has inevitably brought to the fore the aspirations, professional development and leadership of the growing number of other non teaching staff in schools (Robinson et al. 2008). New models of school collaboration and leadership (Arnold, 2006) are evolving in the form of federations and other partnerships. These developments are creating career structures and opportunities for administrative staff in general and for SBMs in particular. Although the numbers are as yet very small, some SBMs are now undertaking the National Professional Qualification for Headship (NPQH), which is mandatory for new headteachers in state funded schools. A change in legislation has potential to further enable SBM professional advancement: the requirement for academies (schools funded by central government but free from local authority control) to employ a qualified accountant was removed by the then newly elected coalition government in summer 2010.

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1 The National College for School Leadership (NCSL) was launched in November 2000 to deliver leadership programmes, support research and stimulate innovation and debate (NCSL 2002). It is currently known as the National College for the Leadership of Schools and Children’s Services.
Despite the apparent progress made in raising the professional status of SBMs in England, various studies conducted for the National College have found that the potential of the SBM role to support educational outcomes is often little understood by stakeholders in England and that this is blocking the ability of SBMs to impact as fully as they might otherwise do (e.g., Wood et al. 2007; Woods et al. 2007; Wright and Colquhoun 2007; Woods 2009). Few small primary schools can afford the services of a professional SBM, though it is headteachers in those schools that are especially subject to increased work pressures as they often have very limited opportunities for delegation. Employing SBMs to work across groups of small primary schools is one strategy for supporting this group of headteachers and potentially reducing the growing number of rural primaries threatened with closure. In 2008 the National College launched a programme of ‘SBM demonstration projects’, within which groups of schools were tasked with devising ways of sharing business management expertise (www.nationalcollege.org.uk). This proposal arises from research on this programme.

The paper draws briefly on headteacher questionnaire and diary data but more substantially on verbatim quotations mainly from primary headteachers, who made up the majority of educational leaders taking part in the programme. It will illustrate their views on (i) how more than two decades of reform have influenced their sense of professional purpose and satisfaction, (ii) ways in which the professional roles of SBMs are seen to impact on headteachers’ professional lives and (iii) factors influencing the ability of headteacher and SBM roles to function effectively together in supporting favourable educational outcomes.

**PERSPECTIVE**

Educational policy in England in recent decades shares common ground with that of many other industrialised nations in attempting to ensure competitiveness in the global economy (Levin 2004). De-centralisation, standardised testing and the pressures of the education quasi-market among other trends have led to significant changes in schooling. Since the 1988 Education Reform Act, much of the administration of schools has passed from Local Authorities (LAs) to headteachers and governing bodies and increasingly schools have been encouraged to bid for and manage large sums of money. Alongside these developments, there has been an explosion in the use of information and communication technologies, both for educational and administrative purposes, and an increasing demand for data from schools to support national mechanisms of accountability and comparison (SATS scores, league tables etc).

What is taught in English schools, and how, have been overhauled via the introduction of the National Curriculum during the same period. Further, the make up of the school workforce, and the way schools as organisations are structured and funded, have been fundamentally re-thought. Workforce reforms designed to support individual learners, teachers and the wider ‘social care’ function implied by the Every Child Matters agenda have resulted in a rapid increase in numbers and a proliferation of roles among ‘associate professional’ colleagues in schools during this period (Edmund). The government green paper Every Child Matters (ECM) published in 2003 set out an ambitious ‘shared programme of change to improve outcomes for children and young people’ (www.dcsf.gov.uk/everychildmatters). This and the subsequent Children’s Plan (www.dcsf.gov.uk/the children’s plan) emphasise collaboration among schools and between schools and other agencies (e.g., health and social workers) to provide integrated educational and welfare services.
The implications of this unremitting pace of reform on the professional lives of headteachers has attracted considerable scholarly attention. Of particular relevance to this article are two strands of research and policy in relation to headteacher professionalism: (i) the body of work that deals with the appropriateness of the professional development of headteachers for the challenges they face and (ii) scholarship on how the headteacher role has changed in recent decades and the influence of this on incumbents’ sense of professional identity. First, studies of early career headteachers point to the importance of informal work-based learning as a supplement to the formal training provided via the NPQH (Crow 2007; Rhodes, Brundrett, and Nevill 2009; Kelly and Saunders 2010). They emphasise the value of relationships with leaders both prior to taking up post and in the early career. Networking, mentoring and coaching are highlighted as key in helping new headteachers to negotiate successfully the demanding processes of socialisation and role-identity transformation implied. Other leaders are seen to play a significant part in developing management and administrative knowledge and in helping new incumbents to deal with the initial shock at the demands of their new role and sense of isolation that is often experienced. Areas identified as ones for which new headteachers are most likely to feel ill-prepared are ones for which SBM expertise is particularly well-suited: finance, people management and site and premises management (Rhodes, Brundrett and Nevill 2009). A study of headteacher views on their continuing professional development (CPD) needs in Scotland indicates that effective people management continues to be an area of concern beyond the early stages of headship (Woods and Woods 2009). Newer headteachers prioritised areas such as technical knowledge, rebuilding confidence and improved support and information. Experienced headteachers highlighted the importance of time for reflection, which was absent from their professional life.

Many studies have investigated teacher and headteacher professionalism, or sense of professional identity (Bottery 2007; Day and Smethem 2009; Swann et al. 2010, Storey 2007; Ball 2003; Forrester 2005). A common theme in some of this work is the notion that centralised reforms, with their focus on measurement, management and supervision, have tended to undermine the more child-centred, holistic approach to education that had prevailed in headteachers’ earlier careers and that relied on trust between colleagues and between teacher and parent. The change in professional identity required to embrace the new ethos has led to stress, disaffection, alienation and a sense of loss in some educators (Kirk and Wall 2010; Ball 2003; Woods and Jeffrey 2002). Swann et al. (2010) identifies the need to be trusted by government and the general public as lying at the very core of teacher professionalism, which might help to explain why reform has impacted so significantly on the sense of self of many teaching professionals. Though the conceptualisations of professionalism underpinning the analyses of these authors differ, they present a similar picture of a group of professionals under pressure and of a role that fewer are willing to take up.

**STUDY DESIGN**

The headteacher data discussed in this proposal formed part of a large-scale, multi-method evaluative research study during 2008/10. This included gathering the following data from 35 demonstration project settings in which bespoke, shared SBM solutions were developed by over 300 schools working collaboratively in small groups with other schools and agencies:

- An on-line survey completed by 113 key programme participants to obtain mainly numerical evaluations of impact
• Work diaries completed by 51 headteachers recording work over a ‘normal’ seven-day period
• Fieldwork at each of the project settings, including 125 semi-structured interviews with headteachers, SBMs and other demonstration project participants, which together constituted what can be described as a ‘collective case study’ (Stake 1995).

The next section reports findings in relation to headteachers’ perceptions of their professional lives and the influence of project SBMs on these.

FINDINGS

Professional lives of headteachers

Consistent with research referred to above, headteacher diary and interview data in the study left little doubt that their role was perceived to be a demanding one. Headteacher diary data provided a broad indication of the hours worked and the types of work-related activities engaged in by headteachers. At an early stage of their projects headteachers were asked to record their work activity in 30-minute blocks over a 24-hour period using a simple proforma for seven days, either electronically or on paper. Participants were asked to choose a label that best described the main activity in each of these half hour blocks of time from a list of codes. Examples of the types of activity to be assigned to each code were provided with guidance notes. The nature of the headteacher’s work varies considerably from week to week depending on seasonal and other demands. Therefore, in choosing the week(s) in which to complete their diaries, headteachers were asked (i) to avoid ‘exceptional’ weeks, such as the beginning or end of term and (ii) to note anything that marked a day or week out as different from the norm. Only very rarely did headteachers signal that there was anything atypical about a day/week in question, so it is assumed that the data are reasonably representative of work activity among this sample. The instrument was piloted by a group of headteachers and modified slightly in light of their comments.

Usable diary returns were received from 51 headteachers at the early stage of their demonstration projects, 46 primary headteachers across 16 demonstration projects and five secondary headteachers from two projects. Though the hours worked varied considerably, diary data indicated a widespread tendency for the programme headteachers to devote a high proportion of the week to school-related business. The shortest recorded week is 36.5 hours (only one of three under 40 hours), with a third (33.3%) recording a working week in excess of 60 hours. The average length of working week recorded was 59.1 hours. There was no discernable difference in length of working week, or clear difference in work patterns, between primary and secondary headteachers. In both phases individual variation was very marked and weekend and evening working commonplace.

In terms of the activities undertaken by these headteachers, categories of work include (i) those which could be considered central to the specialist headteacher role as ‘leader of learning’, and thus not easily delegated to a non teaching colleague and (ii) ones which might be performed, either whole or in part, by an SBM or non-qualified teacher delegate. The first category (requiring teaching expertise) include activities in connection with teaching and assessment, pastoral care and dealing with poor pupil behaviour; those connected with developing and supporting teaching staff in their professional role (eg mentoring, appraisal discussions, leading staff meetings, observing lessons, teacher recruitment interviewing, own
professional development); strategic planning; liaison with parents, governors, the local community, other headteachers and the media.

A high proportion of headteacher time was being spent on activities related to leading learning and strategic planning among our sample, though the average length of working week suggests that this was at the expense of leisure time in many cases. The diaries showed that some headteachers use weekend working for activities (such as strategic planning) that require blocks of time, perhaps a result of the fragmented nature of the working day. A few hours of actual teaching formed part of most headteachers’ weeks, but other activities connected with pupil learning, behaviour and welfare included preparing and leading assembly; lunch or bus duty; judging competitions etc. Strategic planning included preparing for and leading meetings with staff or governors, and preparing plans with a longer term focus.

Although the extent to which activities can be neatly divided between the two postholders is far from clear cut. activities assumed to be more readily delegated to a suitably qualified SBM include the administration of HRM and CPD of teaching and support staff; developing support staff in their professional role; managing buildings/premises and ICT; financial management and budgets with a short-medium term focus; dealing with other agencies or support staff in other schools; marketing and fund-raising. Collectively a substantial proportion of headteacher time in this sample was being spent on activities where a business manager might be able to shoulder more responsibility: an estimated 16.75 per week (28.4%). This is significant given the long-hours worked in many cases.

It is important to note that the above figures are averages that disguise considerable variability between schools. Transcriptions of interviews with headteachers provided more detailed insights about the professional lives of the demonstration project programme headteachers. Experienced head teachers acknowledged that their professional functions had grown in number, scale and complexity over time. Younger headteachers saw themselves as having a much wider remit and heavier workload than their predecessors had done. It is important to note that headteachers were uncomplaining about their lengthy working weeks. Some stressed that they fully expected to work long hours and did not resent it. What interviewees found frustrating was the fact that in spite of the long hours, they were not sure that they were making the right decisions and were prone to doubt whether they were doing their job adequately:

*But I bet you if you were to ask any of those heads [working exceptionally long hours], not one of them would think they were actually doing it well. No matter how many hours I work, the first thing I think is ‘Did I do it right?’*

A shift in emphasis was noted away from engaging with children and teachers and towards a more significant focus on finance and administration. Findings reflected the fact that headteachers in small primary schools particularly, where potential for delegation is often highly restricted, can find that the many and often pressing calls on time and attention can prove a distraction from their main role as educational leaders:

*We all trained as teachers, yet I’m supposed to know everything there is to know about finance. There is health and safety that we are responsible for. It’s massive. We are supposed to perform fire risk assessments.*

*Things get changed every year. You never do the same thing twice, .... so you get further and further away from the real job.*
The last thing that you get to do is to see is what the children are doing and directing their learning and ... making sure the teachers get the best inputs they can to develop as professionals. Those things go to the bottom of the pile.

Inexperienced headteachers can be particularly vulnerable to the administrative demands being made of them as it is difficult for them to know which tasks can and cannot be ignored. An experienced primary headteacher talked of how they had developed the confidence to resist what were considered unreasonable or unproductive demands being made of them in a way that a new incumbent would be unable to do:

If you are a new head, you buckle down and you are spending all your time number crunching.

Echoing research referred to above, in evidence in some of this testimony was a strong commitment to the care of the whole child, which emerged as a significant part of professional identity, especially among some primary educators. The many demands on the headteacher’s attention was perceived to be in conflict with this aspect of their role and caused tension for some:

What used to happen to me was I would go in, covering lessons or whatever, and my mind wasn’t 100% on what I was doing with the children, god forgive me, because I was thinking about all the other work that I had to do when I’d finished in my classroom.

But it’s not just the academic side of things. It’s really getting to know your kids very well and that, I would say particularly in primary, is absolutely crucial. To me what’s more important than the academic side of things anyway is actually having that relationship with the children so you know that they have confidence, that they have strong self belief. If they’ve got those things then the learning should follow.

For a proportion of headteachers, coupled with heavy workload, this shift in emphasis in their professional life had given rise to feelings of guilt, anxiety and loss of confidence and motivation, and even, in the more extreme cases, serious health problems.

People that have known me from before being a head noticed that my confidence levels have plummeted. My ability to deal with what would have been normal.

Last year, because I was so desperately stressed I got to the point where stuff came across my desk and I didn’t know what to do with it. I would pick it up a few times but I couldn’t actually make sense of anything because I wasn’t taking anything in.

I was shocked to go to a headteachers’ meeting and I was sat with a group of heads and they were comparing sedatives and they were describing what it was like to go mad but it was general conversation and they were just talking matter of fact about it and comparing what drugs they were on to keep them at work.
SBM impacts on headteachers’ professional lives

Questionnaires revealed that qualified SBMs were improving the professional lives of the demonstration project programme headteachers considerably. In projects just a few months from the start, 91.4% already stated that SBMs were having a favourable impact on their workload and 83% on their job satisfaction, with 86% believing favourable impacts would increase over time. It is important to note that government funding had been provided to enable the demonstration project schools to develop their shared SBM provision, so this may have led participants to present their projects in a positive light. It is therefore necessary to treat the percentages arising from questionnaire data with due caution. However, the enthusiasm for the SBM role among headteachers at interview seemed genuine and supports the favourable picture emerging from these on-line questionnaire data.

Interviews illustrated ways in which the specialist SBMs on the programme were impacting on headteachers’ professional lives by enabling them to regain their focus on educational leadership and improving headteachers’ perceptions of their own efficacy. First, by providing opportunities for delegation, SBMs were reducing headteacher workload (eg in finance, preparing pupil data, administration and management of associate staff). Second, SBMs were alleviating doubts and anxieties about making mistakes in important but technically complex areas where headteacher confidence was sometimes lacking (eg finance, health and safety, employment legislation). Third, SBMs were enabling a better sense of direction and control through expertise in areas such as project management and long term planning. Finally SBMs were providing psychological support through being someone with whom the headteacher could discuss the non educational aspects of school leadership.

Perhaps unsurprisingly, finance, the traditional focus of attention of the school bursar, was an area commonly referred to by headteachers as one where SBMs were making a significant difference to their professional lives. Headteachers commonly admitted that due to lack of expertise and lack of time they were not always convinced that public money was being put to the most effective use in their schools for delivering pupil outcomes.

School staff costs typically represent much the largest proportion of any school’s outgoings, so good HR practice is an important aspect of school effectiveness. A key element of success in any school will be the ability to develop and maintain a good match between the knowledge, skills and experience needed to achieve desired educational goals and those possessed by the staff. Activities in the area of Human Resource Management (HRM), such as recruitment, induction, succession planning, dealing with sickness absence and professional development, are therefore essential but do not always receive the attention they deserve in schools. A means whereby SBMs were impacting on the quality of HRM in project schools was through their ability to give advice quickly and appropriately. Because of the complexities of employment law, HRM tasks were identified as being both time-consuming and stressful for headteachers, who often lack expertise in this area. In contrast to guidance from other sources, SBM advice was especially valued because it was tailored to the specific school context:

*She [SBM] knows that if we get it wrong, we face the flack. She gives us advice based on what she knows and she knows our schools and she knows what's going to work for us.*

Premises and site management was another area where programme the professional expertise of SBMs was seen to be making a difference to the working lives of headteachers:
I actually went round [the school] with my deputy saying ‘That needs doing and that needs doing’. In the past I would have almost tried not to look because of the thought of having to get the quotes and deal with contractors. I was able to pass it over to the SBM. She will get far better prices than I would get. It’s wonderful for me because it means that I can focus on the other aspects of the school development plan that are purely to do with pupil progress and the welfare and the wellbeing of my staff and children.

It [impact of the SBM role] has been massive, absolutely massive. I can’t even begin to put it into words. We just did a £580,000 build ourselves which we managed with an architect. There is no way I could have had two weeks off in the summer holiday if I hadn’t got an SBM here to manage that and to make decisions. They talk to the bursar now, the caretaker, the office staff, all areas that needed a lot of my time and energy and now I can concentrate on what I need to do.

Interviewees mentioned improvements to systems, policies and procedures that had been developed as a result of the demonstration project that were enabling staff to work more efficiently and effectively:

*It makes the running of the school a lot more efficient. It [having systems and policies in place] frees up a lot of time for teachers. Because procedures are so clear they know exactly what they’ve got to do and they’ve only got to do it once.*

*She [The SBM] is responsible for safeguarding so absolutely directly it’s had an impact. One of her jobs, which I used to do before she did her present job, was to make sure we comply with every law that they dump on us, which we do. All our policies are up to date. Her job also encompasses process: ‘Is there a better way of doing it?’ Often there is, so that’s constantly evolving. So the impact on welfare is to do with policy, process and procedure.*

Evidence presented so far indicates ways in which programme headteachers believed SBMs had impacted favourably on their working lives. This is of interest in light of research referred to earlier in relation to poor transition and retention rates among headteachers in England.

**Headteacher recruitment and transition**

Effective SBM provision, with its potential to re-align the headteacher role towards educational outcomes, was seen to be an important element in improving future headteacher recruitment through making the job more attractive. SBM provision can help by removing what programme headteachers perceived to be the main *barrier* to recruitment and retention: a loss of focus on the core task of educational leadership. A number of interviewees commented that deputies were already beginning to see the benefits SBMs were bringing for their headteachers and that this was making them consider more seriously the prospect of putting themselves forward for the ‘top job’ in future:

*Our deputies are seeing the impact that Sam [SBM] is having on our schools and these are the next generation of headteachers.*
I’ve got a young teacher who has finished his NPQH. You talk to him and he says ‘Yes I would do headship with a business manager’.

In addition to aiding recruitment through increasing the appeal of the headteacher role, headteacher interviews revealed evidence of ways in which a suitable SBM appointment could assist headteacher retention. Various examples were given of challenging circumstances that can make headteachers vulnerable to work pressures and contribute to poor health, or colleagues to leaving their post or their profession early. These included (i) those in their first headship, (ii) deputies taking on the role of acting headteacher during an extended period of absence (iii) those in a school or cluster with recent high staff turnover and (iv) when managing complex projects, such as major building work.

A suitable SBM was seen by interviewees as a means of easing the transition into the first experience of headship. Shouldering responsibility for some of the new headteacher’s work was recognised as being critical to successful integration into the role and thus to future retention. In one project, an interviewee spoke of a period of extended absence due to the stress. They were convinced that had they had the support of a qualified SBM and headteacher colleagues at the time that they had since gained through the project, they would not have fallen prey to the pressures that had caused their earlier health problems. They unequivocal about the benefits of the new SBM arrangements for their professional lives and could not countenance a return to a situation where they were no longer available:

I’m absolutely convinced that had somebody like her [SBM] been in post when I started my job I wouldn’t have become ill. If we couldn’t keep her I’d leave. I couldn’t go back to that. It would be horrendous.

Other examples mentioned of when SBM support might be especially important for a new headteacher were (i) when taking on a particularly large or complex organisation or (ii) where the new incumbent, as a deputy, had limited access to aspects of the headteacher role in their former job, so had been unable to develop adequate expertise:

My governors have already been raising the situation of succession. It was a junior school and then we developed primary, then nursery came on board and now we have got fully fledged children’s centre provision. The issue for my governors is who in the future would want to take on that role. It’s a big job and it would be daunting. I’ve grown with it. The SBM role could potentially diminish some of the workload of that new head and change what their job description would look like.

We’ve got someone on NPQH placement with us at the moment and it’s an area [finance] that unless your previous head has allowed you access, you have absolutely no idea about. The SBM can help with that.

When I was off my deputy acted head. That was an incredibly steep learning curve. She said quite openly that she doesn’t think she’d have coped had it not been for the SBM because there is just so much to learn.

In Greenways the chair of the governors finance and resources committee has just retired and the only administrator is about to retire. We’ve got a new Head
starting and that would be a horrible situation for them then, if you didn’t have that continuity [SBM in post].

In addition to reducing workload and helping to develop specialist knowledge when new headteachers begin their first headship, SBMs were perceived to provide benefits for the transition of deputies through more effective on-the-job mentoring in important business management skills prior to taking up a headship:

I have got lots of enthusiastic young staff who he’ll [SBM] be able to mentor. When I went into Headship, I was faced with huge financial responsibilities. I didn’t know what to do initially. You were thrown in at the deep end. But I think the future must look different. It has to be different.

When we first came to headship you are looking at expenditure in terms of ‘What are we spending on this?’ and ‘How can we save money on that?’ We are now looking at income and we are saying ‘What can we do to provide some more income to benefit our children?’ We need the generation there with skills to match and SBMs can help with that.

As well as enhancing recruitment and enabling retention in the important early stages of first headships, interviewees also pointed to ways in which SBMs could help retain experienced leaders, through allowing time or new perspectives to enable a wider or more strategic focus:

I think it can give us an opportunity as heads to step back and see what are we not doing or what have we put to one side. I mean the latest Ofsted [Office for Standards in Education, Children's Services and Skills] stuff, involves thinking about where the head stands within the community, that strategic side. With so many people wanting your attention, it [having an SBM] helps you to actually release some of your own time so that you can give that attention.

There’s been a fantastic amount of learning. I’ve had my mind blown this year and really challenged by having an advanced SBM, which is a strategic role.

I don’t think my governors would be so keen for me to play that role [National Leader of Education] unless they were sure of the quality of what we have. With Jim [SBM] being known to governors, they know it’s all in safe hands. I have been a head for twelve years, and so I quite like the possibility of doing other things. Developing this role might keep me in post. I am just appreciating being a headteacher again.

Other evidence pointed to the fact that an SBM can make a crucial difference for school leaders who are struggling to ensure schools in difficult circumstances perform well. This in turn might help to keep them in post so that their hard won knowledge and experience are not lost to the profession. In one demonstration project an experienced and well-respected headteacher of an inner-city primary in challenging circumstances had been required to step down after the school received what the LA considered to be an unsatisfactory inspection report. She subsequently commented that the project had brought home to her that having had the support of an effective SBM earlier might have enabled her to take effective remedial action sooner and kept her in post.

The evidence presented above provides a window on the challenges faced by project headteachers in their working lives and of the personal costs that these can give rise to. The findings illustrate programme headteachers’ ideas on the ways SBMs can impact in positive
ways on (i) the recruitment of new and experienced headteachers by making the role more attractive and (ii) aiding the retention of those new to the role, (iii) supporting professional development opportunities that would be attractive enough to make experienced headteachers think twice about opting for early retirement and (iv) by providing support for headteachers under pressure to enable them to stay in post or have an effective return to work after a period of extended absence.

Discussion and conclusions
The findings presented above indicate ways that the professional practice of the SBM were seen by participants as a means of developing and supporting headteachers in their own professional role. Their testimony indicates that SBM expertise matches closely those content areas where research reported earlier in this paper indicates that headteachers can feel least well prepared (eg finance, HRM, technical and legislative areas, site and premises). It also illustrates how programme SBMs’ could support the processes of headteacher CPD in ways identified as particularly valuable as a supplement to formal training: on the job coaching and mentoring of deputies, new heads or those vulnerable due to challenging circumstances, or through freeing up time for reflection among experienced heads. Given the number of years required to develop the knowledge and experience needed for headship, attracting and retaining suitable educational expertise will be a key factor in ensuring quality educational outcomes. These data tend to support efforts by policymakers in England to develop the SBM profession as a means of enabling recruitment and retention among headteachers. However, there are a number of caveats to be considered.

First, the headteachers interviewed were all participants in projects that had bid for funding via the government’s SBM demonstration project programme, so it is unsurprising that they would be well-disposed to the idea of exploiting the complementary professional expertise of their SBMs. However, supporting findings from other studies (eg Woods 2009), their testimony also acknowledged that some educational stakeholders still see the SBM role as a threat to headteacher professionalism, creating barriers to its effective exploitation. The culture that has grown up among headteachers over the last twenty years can mean that they now see the role as being a largely administrative one and may be reluctant to delegate any but low level administrative duties to an SBM. Some headteachers will struggle to unlearn habits that have become ingrained because of these systemic changes; may have difficulty conceiving of how their working lives might be otherwise; be worried that their jobs will be threatened; feel hostile to the idea that people who are not trained as educators should have a greater say in how the school is run; or may have grown comfortable with a more desk-based job and reluctant to return to the interpersonally and emotionally more challenging business of leading learning in classrooms and staffrooms. Significant in terms of SBM impacts on their own roles will be the skills and attitudes of the headteachers themselves therefore.

Further, study participants indicated that associate staff can also be unsupportive of change for broadly similar reasons (eg fear of the impact on their own roles, or over job security). Governors and LAs vary widely in their attitude to the SBM role but some will not understand the argument for SBM expertise, especially in the primary sector, and may therefore be unwilling to agree funding for posts at the required level.

Work pressure and fragmentation, especially among primary headteachers, can slow progress towards effective change. Equally inconsistent or inadequate administrative support may prevent SBMs using their expertise to maximum benefit.

Sustainability of the SBM arrangements beyond the project term was viewed as a key concern among participants, either through the anticipated loss of a key member of staff or
because of lack of funding to pay for a new post over the longer term. While there was commitment to retaining the role, it was not always clear how this would be achieved financially.

Headteacher and SBMs in the study concurred that expertise in SBM practices alone will be insufficient for enabling the range of benefits achieved by the most successful demonstration projects. As well as ability in the role, the most effective SBMs will also be able to communicate the relevance of their role for pupil outcomes to a wide ranging audience: the associate staff they will often lead or manage; headteachers and other teaching colleagues; parents, governors and LA colleagues. This requires confidence, resilience and commitment along with highly effective interpersonal and communication skills. Successful SBM recruitment and selection processes will be critical if educational impacts from SBMs locally and nationally are to be achieved.

Headteachers themselves also have a valuable role to perform in enabling SBMs to support headteacher recruitment and retention locally and nationally by actively educating school colleagues, other headteachers, governors and other stakeholders about the ways that the SBM role complements their own in bringing about school outcomes.

CONCLUSIONS

Though significant obstacles to impact exist, the findings of this study support the notion that, where the local context is favourable, the professionalisation of SBMs can offer a means of impacting positively on self-perceptions of confidence, job satisfaction and effectiveness among headteachers in English schools. Through reducing workload, enabling focus and acting as an advisor and assistant in key non teaching-related aspects of the job, the complementary professional preparation of the SBMs was enabling some hard-pressed headteachers in the study to re-establish a fuller commitment to the educational leader role that had attracted them to the job initially.

About the presenters:

The presenters are all members of the Management and Institutional Development Group at the School of Education, University of Manchester. As well as individually being involved in studies relevant to educational leadership and policy over many years, more recently they have collaborated on a number of projects in relation to national strategies to develop capacity in school business management.

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