The challenges of school business management during COVID-19

A research report by **K** The Key

September 2020

Contents

Foreword

The coronavirus pandemic has had, and will continue to have, enormous repercussions for the way schools are run. We have seen schools, and the professionals who run and work in them, striving to maintain 'business as usual' under impossible conditions, dealing with everything from setting up remote learning to feeding the nation's more vulnerable children, amid uncertainty and unpredictability - and the challenges keep coming.

In the media and sector at large, the focus has predominantly been on the pandemic's impact on pupils and families, on teaching and learning, and to a degree, on teachers themselves. But, behind the scenes, there have often been just 1 or 2 people in each school tasked with the unenviable challenge of 'making it happen'. Working alongside headteachers, school business managers (SBMs) and their colleagues in HR, finance and operations roles, have worked tirelessly to "put the meat on the bones" of official government guidelines. They have had to rapidly interpret new rules and expectations, which might at first sound straightforward in an official news briefing, into the practicalities of managing buildings and systems that were never designed to accommodate that degree of flexibility.

This report shines a light on the epic task undertaken by SBMs and makes recommendations as to how we might improve conditions for our business managers and leaders as we enter possible new waves of the pandemic and beyond. Our goal has been to recognise the enormity of the work undertaken and reflect on where the sector can further improve in order to support this fundamental role in keeping schools going. →

At The Key, we have endeavoured to support education leaders in all roles during this unprecedented time. It has not been a straightforward job but we know our challenges have been nothing in comparison to those faced by the schools we've done our utmost to support. We made all of our content related to COVID-19 accessible to all schools for several months, and had record numbers of school leaders accessing our articles and practical resources. In March, over 60,000 senior leaders accessed the content on our site and we worked with partners like Microsoft and Google to help schools start working and teaching remotely. In addition, we have shone a light on how schools themselves have overcome challenges, to share great new practice within the sector, from exciting ways to use YouTube in teaching, to unrelenting resourcefulness in finding ways to get food to children on free school meals.

If you're reading this now as an SBM or a school leader in any role, I hope we helped you in some way to navigate the challenges of this unique period and made your job just that bit more manageable.

At The Key, we continue to look on in awe at everything you do to keep the wheels turning, and we'll be doing our very best to support you through the academic year ahead.

Chris Kenyon
CEO, The Key
September 2020

Introduction

This report was intended to be produced in the spring term of 2020. We had planned to present the findings of an extensive survey we ran in December 2019, where we looked into the challenges of the SBM role. The results of that survey were fascinating, and showed the huge breadth of the SBM function, with its vast number of responsibilities and requirements for expert knowledge in complex areas.

As we were nearing publication, the COVID-19 pandemic struck. Our attention was, unsurprisingly, diverted to supporting schools up and down the country to make sense of what was going on and being asked of them, and helping them to adjust practice in everything from teaching and learning to health and safety.

As the summer term came to an end, it was clear that our original, unpublished report was now a relic from another era, and that we needed to look again at what SBMs had faced during 2020. We made the decision to re-survey, using less than a third of our original questions, and including new areas that specifically related to the pandemic.

What follows is the result of our July 2020 survey, with comparisons, where relevant, to the December 2019 data. We have also drawn upon insights picked up during ethnographic research and qualitative interviews carried out with SBMs in autumn 2019, to add context where needed.

The report aims to summarise the particular challenges faced by SBMs during this time, as well as the impact. It offers recommendations for the sector on how the school business management function could be better supported in order to remedy some of the impacts felt, as well as how the sector might prevent further stress in the event of future COVID-19-related challenges.

Our survey respondents

In total, 1,558 respondents took our survey over a period of 3 weeks in July 2020. We saw some drop-off in question completion towards the end of the survey, with the lowest response coming from 1,296 respondents. We have indicated total response numbers to given questions where they are lower than 1,558.

The vast majority (80%) of the respondents identify as a 'school business manager/leader/bursar' with a further 5% leading business management over multiple schools. The remainder have more specialist roles within the school business management team, such as HR, finance or premises management. We have used the term 'SBM' throughout this report to cover the full set of roles represented by our respondents.

69% of our respondents come from the primary sector, which mirrors the percentage of all primary schools in England in 2019[1]. Secondary school respondents make up 18% of our sample, which over-indexes the 14% of schools which are secondary in England. The remainder of respondents come from special, all-through and alternative schools, such as pupil referral units.

| 69% | 18% | 8% |

Legend: Primary, Secondary, All-through, Special, Alternative

Figure 1:   Which of the following best describes the setting for your core role?, July 2020, base = 1,558

Our respondents are much less likely to be working in a multi-academy trust (MAT) than is the norm nationally. Only 22% of our respondents work in a trust, whereas we estimate that, nationally, approximately 43% of schools are part of a trust[2]. This may have influenced our findings, with maintained schools possibly getting a different type of support than schools in trusts might get from their central teams; we explore this in our section on external guidance. →

1. BESA, Key UK education statistics, October 2019 – *https://www.besa.org.uk/key-uk-education-statistics/*
2. Based on data from The Education List, provided by The Education Company – *https://www.educationcompany.co.uk/*

Respondents come from across the English regions, with the largest percentage (24%) based in the south east. Respondents are however, significantly overrepresented in that region (the 24% compares with only 16% percent of schools in actual terms - although it is still the region with the largest number of schools), and to a lesser extent in London (18% in the sample versus 13% of schools nationally). The remaining regional samples are within 1-3% of the actual percentage of schools in the sector in that region. The graph below shows how our sample compares with the actual breakdown of schools across the regions.
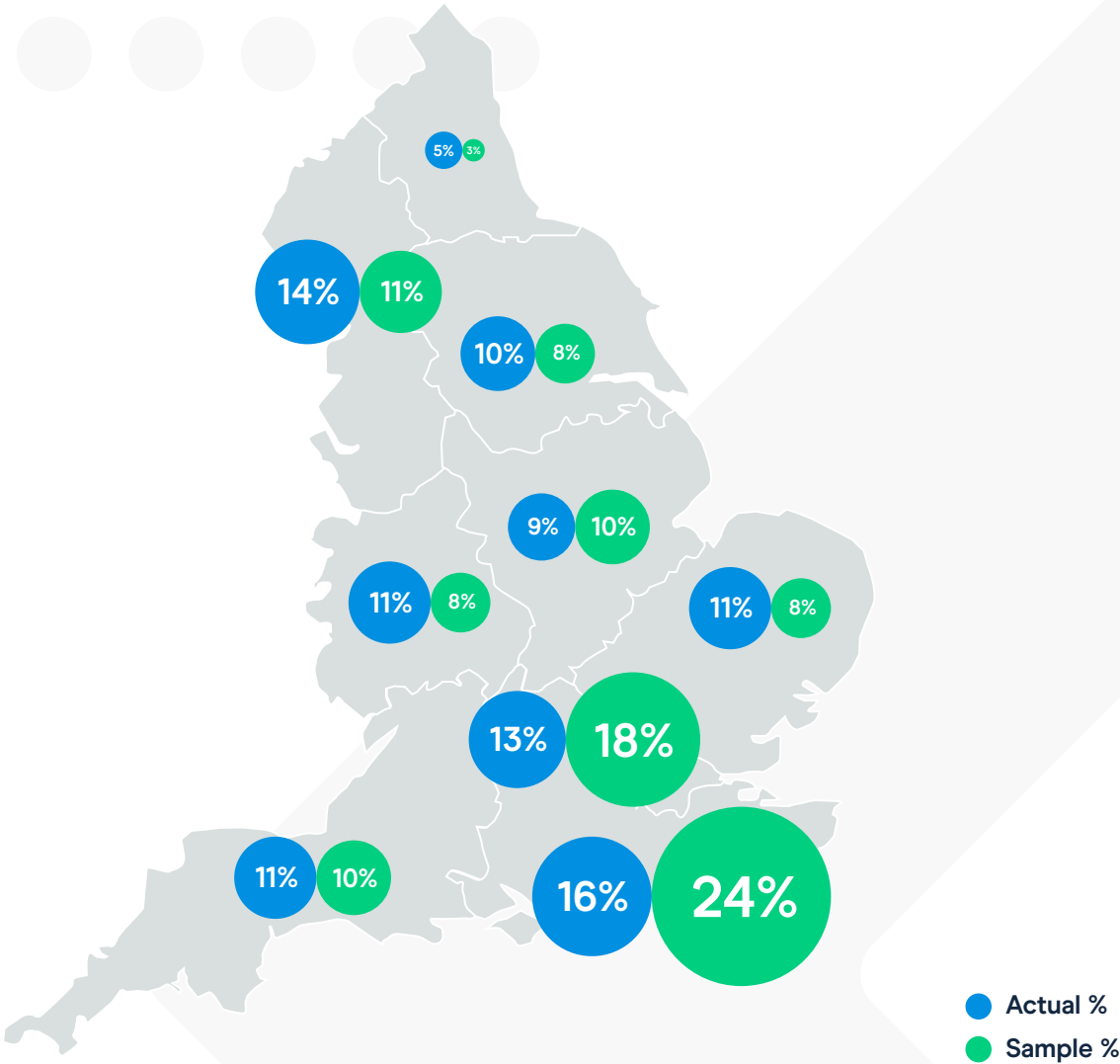

Figure 2: *Comparison of survey sample breakdown by region against actual number of schools, using data from The Education Company*

Please note that, while we feel our sample is large and broad enough to meaningfully showcase SBM views from across the country, our data has not been weighted and is not statistically representative.

Findings

SBMs have worked even more overtime than usual

We knew from our study in December 2019, that SBMs routinely worked longer hours than they were paid for contractually (this is backed up by research carried out by ISBL in 2019[3]). Back then, a combined total of 40% told us they work more than 7 additional unpaid hours a week, which we can calculate as being more than the equivalent of 1 working day. 15% said they worked 'more than 11 hours' over what they are paid for, roughly equivalent to a day and a half extra. Interviewees told us that this additional work is often "seasonal", with particularly busy periods coming in September at the start of the new academic year, around budget deadlines in maintained schools (March) and in the second half of the summer term if there is a lot of staff recruitment.
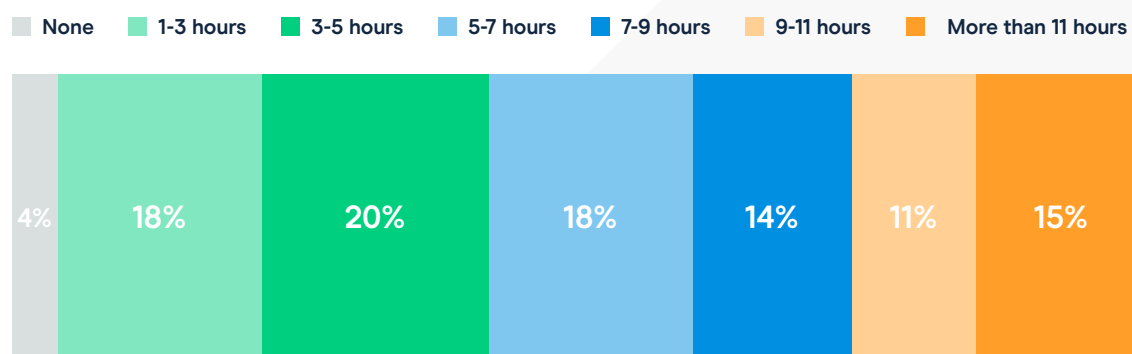
None	1-3 hours	3-5 hours	5-7 hours	7-9 hours	9-11 hours	More than 11 hours
4%	18%	20%	18%	14%	11%	15%

Figure 3:   On average, how many hours a week do you work over and above your paid, contractual hours?, December 2019, base = 1,434

Cut to July 2020 and working hours had extended further. Bearing in mind the "lockdown period" broadly started after budgets were prepared in maintained schools, and that very little recruitment happened during the summer term[4], we can assume that the normal seasonal stress-points had little to do with how busy SBMs were. →

3. ISBL, School business professional survey workforce report 2020, page 31 – *https://isbl.org.uk/Resource/Sector-research.aspx*

4. Gatsby Foundation, Musical chairs: understanding and tackling COVID-19 disruption to the teacher recruitment market, June 2020 – *https://www.gatsby.org.uk/education/reports*

During this period, the combined proportion of SBM respondents who worked more than 7 hours, on average, over and above their paid, contractual hours, grew to 52% (an increase of 30%). However, the percentage who worked more than 11 unpaid hours a week soared to 28%, an increase of 87%.

What we can also say from our December 2019 study is that a large proportion of SBMs do not work full time, all year round. Among our respondents, the SBM role is in 51% of cases carried out by people who either work term-time only, part-time hours, or both. Often, as we were told in our qualitative interviews in autumn 2019, this is either because the school cannot afford them full time (particularly in smaller primaries), or even more commonly, because they are fitting the role around their own childcare. What we are possibly seeing therefore, is individuals whose lives already involve an element of juggling, having to do even more of that, without being financially rewarded.

> "The challenging part has been working but having my own children at home and not in school."
>
> **SBM, primary school, south east**

| None | 1-3 hours | 3-5 hours | 5-7 hours | 7-9 hours | 9-11 hours | More than 11 hours |

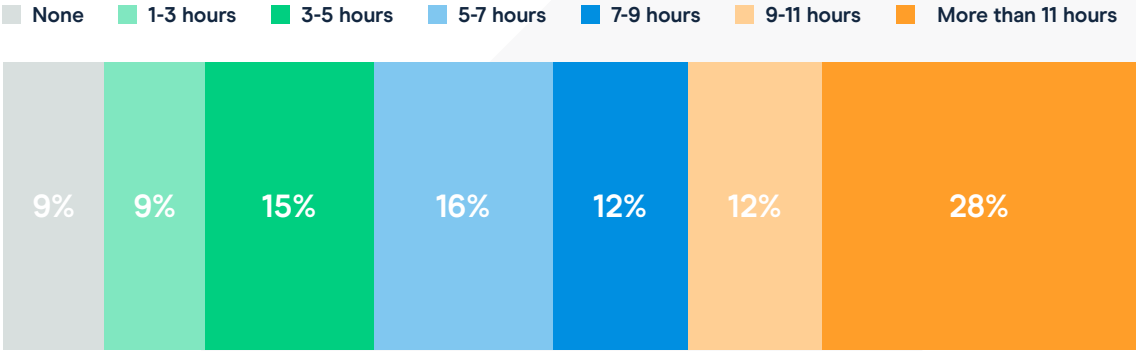| 9% | 9% | 15% | 16% | 12% | 12% | 28% |

Figure 4:   Since the COVID-19 pandemic began, on average, how many hours a week have you worked over and above your paid, contractual hours?, July 2020, base = 1,296

→

Given that we surveyed different groups of people across the two studies, we wanted to clarify whether the number of unpaid hours worked had got better or worse since the pandemic started. Unsurprisingly, we can see that workload increased for most, with a combined total of 58% saying that things had either got "worse" (40%) or "much worse" (18%) :
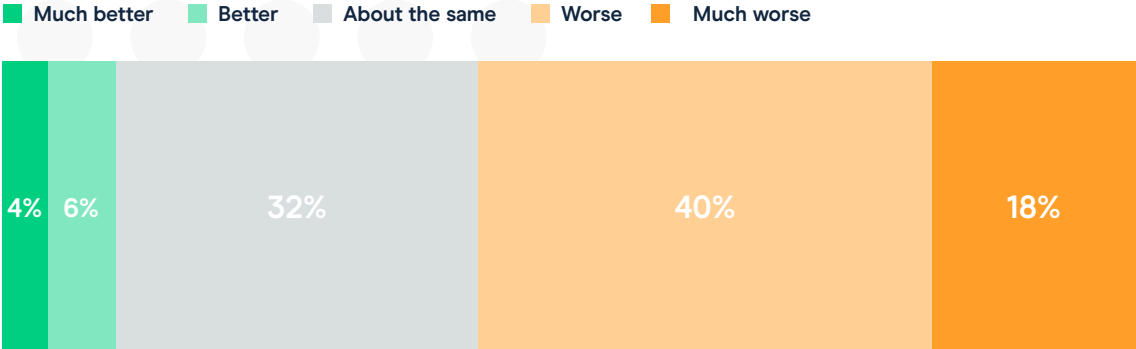
■ Much better   ■ Better   ■ About the same   ■ Worse   ■ Much worse

4%	6%	32%	40%	18%

Figure 5: *Comparison of overtime worked between pre and post COVID-19, July 2020, base = 1,296*

> ## "The additional demands placed on school business professionals have led to long hours and a very heavy workload, all with a backdrop of increased financial pressure on schools as the true cost of managing the disease becomes more apparent."
>
> **Stephen Morales, CEO of the Institute of School Business Leadership (ISBL)**

Wellbeing of SBMs is worryingly low

The increased workload also comes with an impact on mental health. Feelings of frustration, stress and exhaustion run deeply through the thousands of free-text comments our SBM respondents added throughout the survey, but putting this into numbers allows us to see more clearly the toll on SBMs' wellbeing. While we don't have comparative data from December 2019, we can see a worrying reflection of the impact of COVID-19-related challenges in the data below:
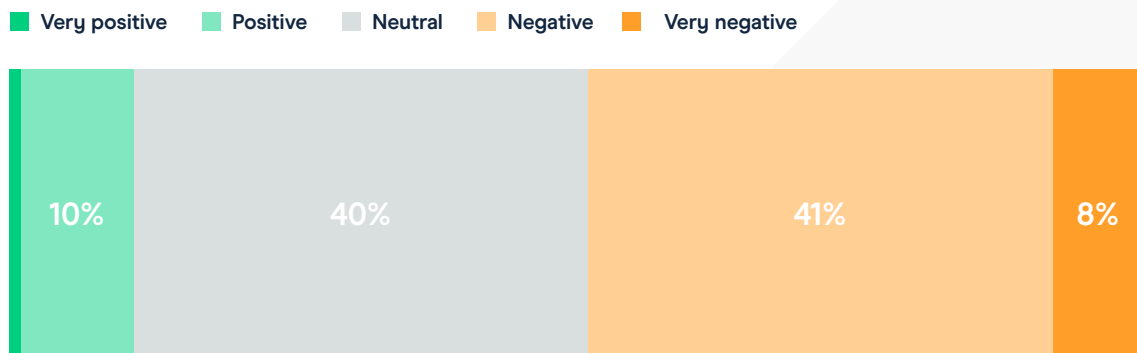
■ Very positive   ■ Positive   ■ Neutral   ■ Negative   ■ Very negative

| 10% | 40% | 41% | 8% |

Figure 6:   *What impact has your work had on your mental wellbeing during the COVID-19 pandemic?, July 2020, base = 1,297*

Just under half (49%) told us that the impact on their mental health had been "negative" (41%) or "very negative" (8%). →

We also know that SBMs' mental wellbeing was already under strain. Back in autumn 2019, our ethnographic and qualitative research pointed to significant stress among SBMs before COVID-19 had even come onto the horizon. If we consider these findings together, it's clear that SBMs' mental wellbeing should be of concern to the sector.

> "The focus on teacher wellbeing, as usual, is top of the agenda, but it is rarely considered for non-teaching staff."
>
> **SBM, primary school, London**

> "The impact of this extra workload coupled with the emotional strain caused by a global pandemic is taking its toll on practitioners' wellbeing and mental health. Not only do we need to recognise the enormous contribution that school business professionals up and down the country have made to keep our education system running, but we also need to make sure we take great care of this group of vital educational professionals."
>
> **Stephen Morales, CEO of the Institute of School Business Leadership (ISBL)**

SBMs have shifted the weight of their time during COVID-19 from finance to premises management - despite this not being their background

The 3 core functions of the SBM role are typically considered to be finance, HR and premises management - although when we surveyed in December 2019, respondents told us in a separate question that, on average, 29% of their time was spent doing something other than those functions.

Back then, we asked them to tell us how the balance of time spent on these 3 roles looked. It looked like this, with finance taking up almost double the proportion of time of the other functions, respectively:
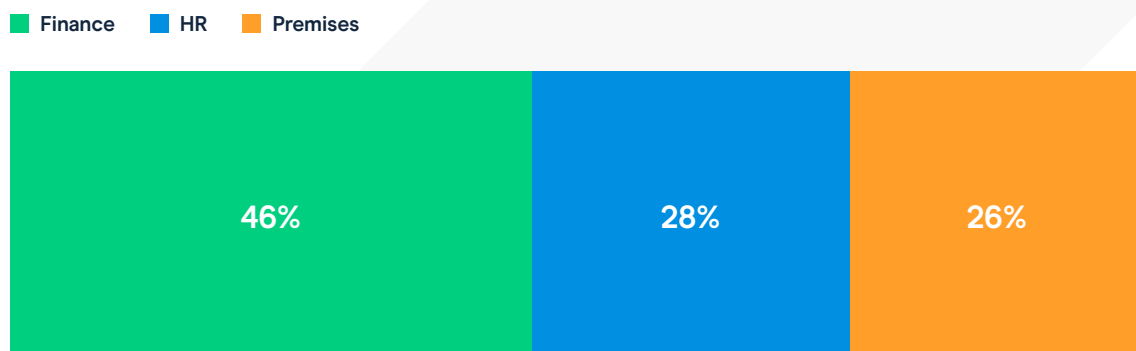
■ **Finance**   ■ **HR**   ■ **Premises**

Finance	HR	Premises
46%	28%	26%

Figure 7:   *Average split of time spent on key functions, December 2019, base = 1,302*

→

In July 2020, we asked SBMs again how the balance of time spent between these 3 functions looked:

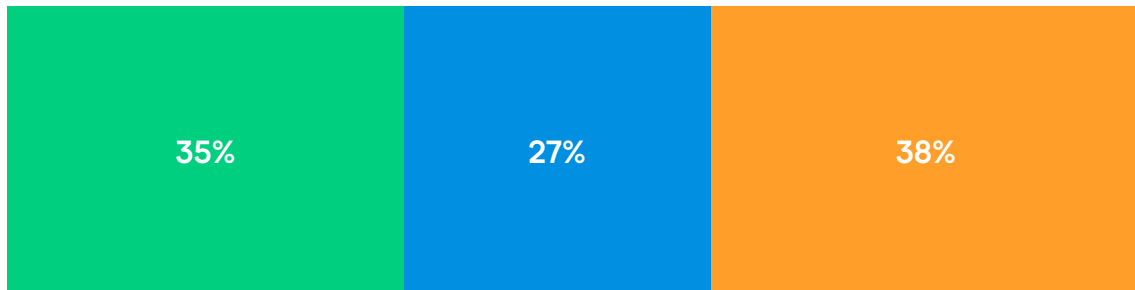**■ Finance ■ HR ■ Premises**

35%	27%	38%

Figure 8: Average split of time spent on key functions, July 2020, base = 1,333

As we can see, while the proportion of time spent on HR broadly stayed the same, the proportion spent on finance dropped significantly, from 46% to 35%. Meanwhile, the proportion of time spent on premises management increased from 26% to 38%.

This is perhaps not surprising, given the huge challenges that SBMs had to manage around ensuring compliance with government guidance on social distancing and other protective measures, closing or partially closing the school site, carrying out additional risk assessments and updating health and safety policies.

What is noteworthy however, is that when we asked survey respondents in December about their experience prior to becoming an SBM, only 15% had come from an "operations" background. The majority had financial or school administration experience. So, for many of our respondents without a background in premises management, the unprecedented demands placed on them during this period would have been especially challenging. →

To probe further, we asked respondents what had taken up most of their time specifically during COVID-19. They were able to pick up to 3 choices from a list of 13. In line with our question above, the top response (picked by 65% of respondents) was 'Health and safety management (premises and people)'. (In addition, many of the 8% who selected 'Other', commented about issues that were ostensibly related to health and safety, e.g. "Trying to purchase the necessary items such as lidded bins etc. to allow us to reopen"). This was followed by "Reviewing government guidance" (50%), and "Dealing with free school meals vouchers" (45%), with one respondent commenting that she was only able to access the Edenred website, which processed those vouchers, after midnight.

65%	50%	45%	29%	22%	17%
Health & safety	Reviewing government guidance	Free school meals vouchers	Revising the budget	Dealing with parents	Arranging cleaning

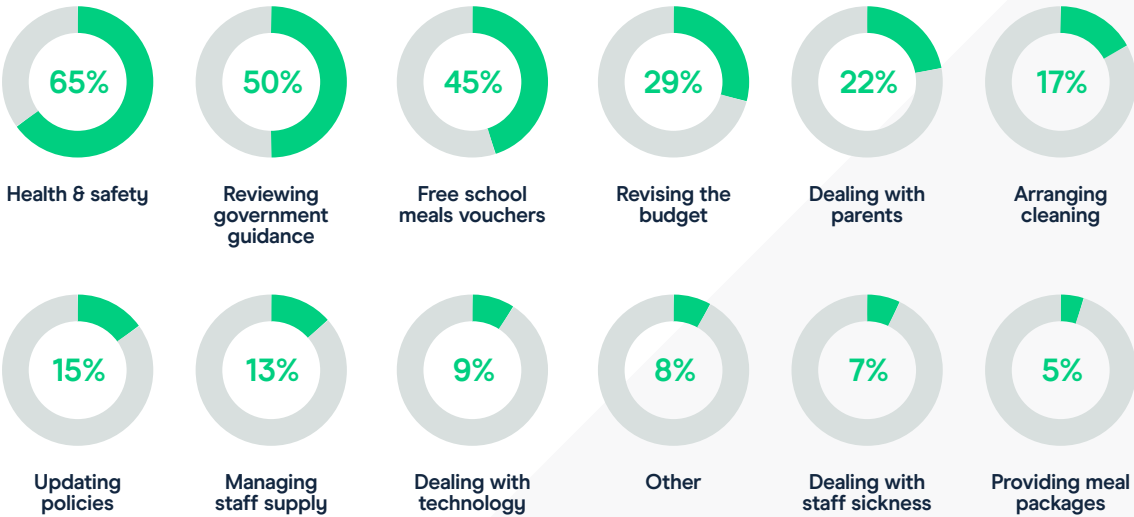| 15%	13%	9%	8%	7%	5%
Updating policies	Managing staff supply	Dealing with technology	Other	Dealing with staff sickness	Providing meal packages

Figure 9:   Of the following jobs, which have taken up most of your time since the COVID-19 pandemic began? Select up to 3 options, July 2020, base = 1,333

"During the pandemic, the emphasis of the school business professional role has shifted significantly away from finance towards troubleshooting, premises and business continuity planning."

Stephen Morales, CEO of the Institute of School Business Leadership (ISBL)

Health and safety, reviewing government guidance, and free school meals vouchers top the list of their most challenging tasks

The spring and summer terms of 2020 were a time of intense challenge for all those working in schools. It was a particular challenge for school leadership teams, of which SBMs are a part (in December 2019, 64% told us they sat on the senior leadership team, with a further 20% attending leadership team meetings). We wanted to unpick what specific challenges SBMs faced during this period, to give us a sense of what share of the work they were leading on.

SBMs' top 3 challenges were identical to those which had taken up most of their time, although with slightly smaller proportions of respondents selecting those options:
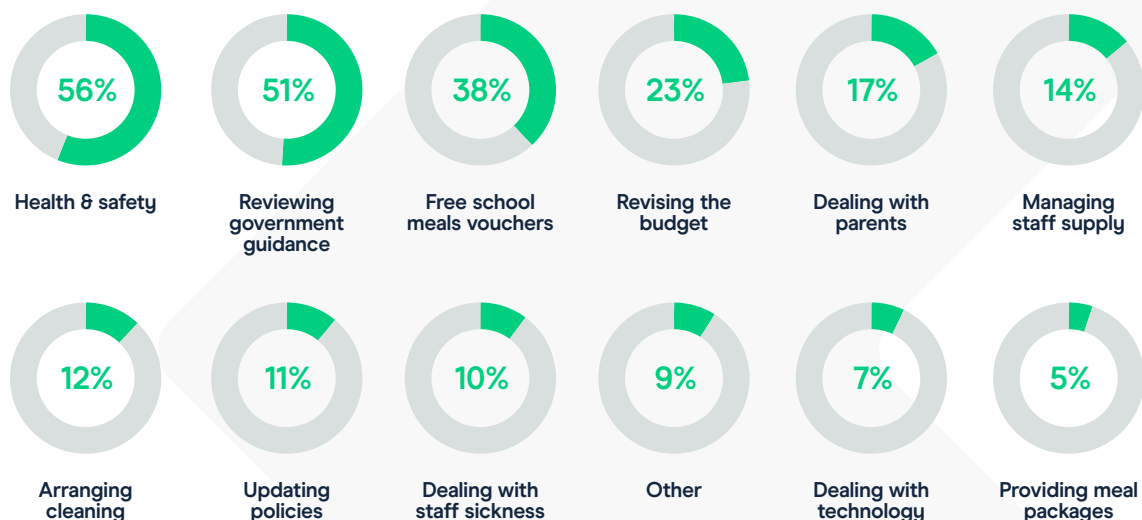
56%	51%	38%	23%	17%	14%
Health & safety	Reviewing government guidance	Free school meals vouchers	Revising the budget	Dealing with parents	Managing staff supply

12%	11%	10%	9%	7%	5%
Arranging cleaning	Updating policies	Dealing with staff sickness	Other	Dealing with technology	Providing meal packages

Figure 10: *Which of the following jobs have you found most challenging during the COVID-19 pandemic? Select up to 3 options, July 2020, base = 1,333*

→

In comments, several respondents made the point that, in addition to the challenges directly related to COVID-19, the day-to-day stresses of the SBM role did not go away:

> "The SLT and teachers were unable to comprehend that the school still had to function, that invoices still had to be paid, that leaking roofs still had to be fixed, that I hadn't suddenly become a 'PA to all'."
>
> **SBM, primary school, north west**

And there was also a sense that SBMs were "the constant" in among the comings and goings of teaching staff, who might only rarely be in school:

> "A big challenge was managing expectations of teachers and TA staff who, ultimately, were on the work rota less than office staff, simply because there are far more of them. The office was inundated."
>
> **SBM, primary school, south west**

Premises and admin were the hardest functions to manage

When we conducted both in-depth interviews and ethnographic studies in autumn 2019, we found that SBMs were line-managing a huge number of staff, as well as a wide variety of roles. Both of these things were a factor in their stress levels - physically line-managing, in many cases, more than 10 members of staff was a struggle (including managing midday meals supervisors who are often only in for a few hours a day, with limited-to-no-time available for 'line-management' meetings or conversations). But, equally, SBMs told us how difficult they found it to line-manage certain roles where they had no understanding of the core function, for example site managers, IT managers and catering. They had overall responsibility for the function, but someone else was running it day-to-day.

When we surveyed in December 2019, we asked SBMs which was the hardest role for them to manage - and the biggest response (22%) came from those picking the 'site/premises team'. Given that a large part of the challenge during COVID-19 has been making the school physically safe and compliant, we were interested to see whether managing the people who were physically ensuring safety was a bigger, or lesser challenge than previously. →

What we can see from the graph below is a significant jump to 35%[5], a 50% increase, in those picking 'site/premises' as the hardest function to manage, although the percentage selecting 'office administration' is also significant at 27%:
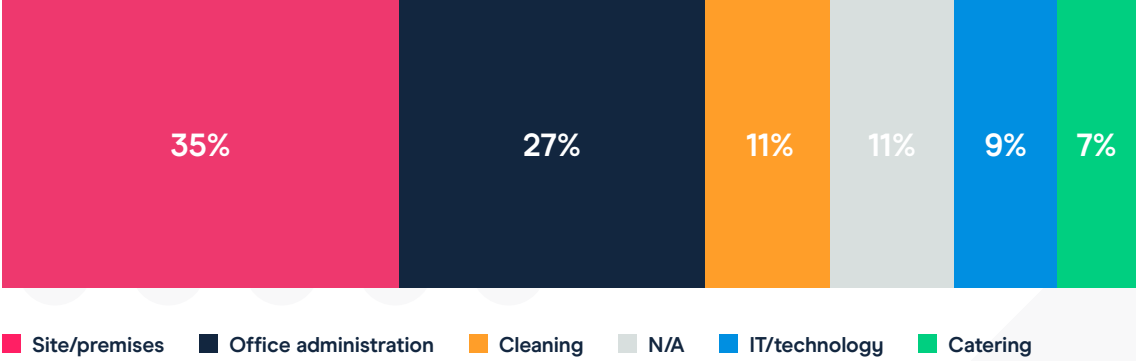

| 35% | 27% | 11% | 11% | 9% | 7% |

■ Site/premises ■ Office administration ■ Cleaning ■ N/A ■ IT/technology ■ Catering

Figure 11: *Which function of school business management have you found hardest to manage during the COVID-19 pandemic? Pick only one. July 2020, base = 1,304*

→

5. *Note that in our December 2019 survey, we laid out the options to include 'in-house' and 'contract' with all roles, and also included 'midday meals supervisors'. In July 2020, we took the decision to remove midday meals supervisors given they were generally not in school. We also condensed the in-house/contract roles for ease.*

We went on to ask them why this function was the hardest to manage. Among those selecting 'site/premises', we had free-text comments from 454 respondents. Many talked about having to manage premises remotely or in the absence of a 'shielding' premises manager:

"The hardest job was managing premises whilst working off site."

SBM, primary school, East of England

"The volume of risk assessments needed, additional guidance for staff and time taken to explain and ensure protocols and safety measures were understood and followed were particularly difficult to manage."

Executive SBM, primary schools, north west

"The logistics of fitting small groups into a small school, moving furniture, finding places to store equipment to be removed, providing spaces for those with EHC plans, ensuring each child has their own equipment, purchasing the extra cleaning products needed. It has been exhausting."

SBM, primary school, north east

→

Among those picking 'office administration', we received comments from 349 respondents. Many of these responses related to admin team members being unable to work their full hours due to a caring role, which created more work for the SBM. There were many comments about the inflexibility of some technology systems, or inability of admin staff to do their jobs at home without an adequate IT set-up. But the predominant reason given was the sheer volume of work involved for the administration team, and the fact that so much of the running of the school depended on just 1 or 2 people:

> "It's a small team and we were impacted by 1 member working from home (due to childcare/home schooling) and another shielding a dependant."

Support services manager, primary school, south west

> "Having to introduce manual processes because classes are split up and can't be split up on SIMS caused lots of work in terms of registers etc."

SBM, primary school, London

> "The volume of work coming through the office has been the biggest challenge. We have been the main cog in the wheel, helping teachers to teach i.e. providing resources, ICT, making sure PPE and cleaning is in place. The office is also the main contact for enquiries from parents, staff and the DfE, as well as dealing with HR issues. This is all on top of the standard job role, i.e. managing the financial year end, and the academic year end."

SBM, primary school, south west

Budgets are not adequate to deal with the impact of COVID-19

In December 2019, when we asked SBMs about their top 3 challenges, from a list of 12, 'Managing budgets' came out top, and was picked by 47% of respondents. Our interviewees told us that it was not the practice of managing a budget that was difficult - 37% had (or were in the process of getting) a professional accountancy qualification. It was the declining budgets that were the challenge - "being asked to do more with less".

Fast-forward to July 2020, and we wanted to know the extent to which SBMs agreed that their budget for the financial year 2020/21 would allow for the impact of COVID-19. With an already-tight budget, how much slack would be in the system to allow for the additional expenditure planned from September 2020 - everything from personal protective equipment (PPE), to signage, additional cleaning, and beyond?

Despite the increase in schools' average core funding[6] for 2021, and catch-up premium funding to help address lost learning[7], the majority of respondents (a combined total of 57%) told us that they 'disagree' (35%) or 'strongly disagree' (22%) that their budget will be adequate to cover the associated costs:
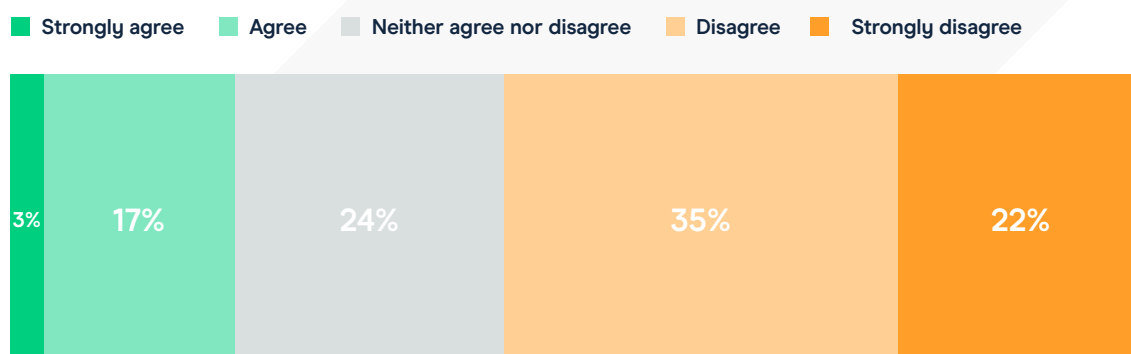
■ **Strongly agree**　　■ **Agree**　　■ **Neither agree nor disagree**　　■ **Disagree**　　■ **Strongly disagree**

3%	17%	24%	35%	22%

Figure 12:　To what extent do you agree that your FY 20/21 budget allows for the impact of COVID-19?, July 2020, base = 1,333

→

6.　GOV.UK, *Every pupil in England to see another rise in funding in 2021* –
　https://www.gov.uk/government/news/every-pupil-in-england-to-see-another-rise-in-funding-in-2021

7.　GOV.UK, *Coronavirus (COVID-19) catch-up premium* – *https://www.gov.uk/guidance/coronavirus-covid-19-catch-up-premium*

What is significant is the huge number (486) of respondents who commented in detail about their budget situation, and the strong feeling behind those comments. There was some anger at the additional expenses schools would have to cover (e.g. inflated-cost PPE, classroom resources for individual pupils, lidded bins), without new revenue to help, and alongside the loss in income that might ordinarily offset these expenses - all against an already-precarious budget situation. The comments below are reflective of the scale of the issues shared by over a third of respondents:

> "There have been huge additional costs for hygiene supplies, cleaning, additional stationery and pencil cases, plus we had to financially support the catering contractor. The COVID fund covers a minuscule amount of the additional costs we've incurred."
>
> **SBM, primary school, south west**

> "We have lost significant revenue. We make £40k per year from our clubs which have not been running, £10k from aftercare, which hasn't been running, £12k from letting our facilities and we have lost thousands from parent fundraising from not having the usual charity events."
>
> **SBM, primary school, London**

Generally, SBMs thought the advice they received was adequate, but they rated central (DfE) guidance higher than local authority (LA) guidance. Those in MATs rated the advice from their central teams highly

Noting the increased need for guidance that the pandemic created, we were keen to find out how SBMs rated the guidance they had received from the DfE, their LA or academy trust/foundation (depending on their status). The following graph shows responses related to the DfE and LAs:

Rating of DfE

16%	67%	18%

Rating of LA

13%	60%	23%	4%
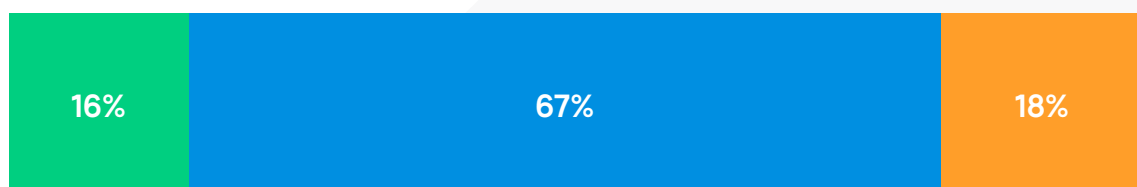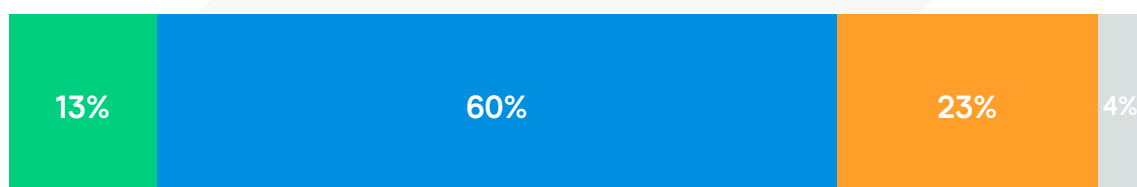
- Outstanding guidance
- Adequate guidance
- Inadequate guidance
- N/A

Figure 13: Percentage ratings for guidance from the DfE or LA, July 2020, base = 1,410

→

We can see that the majority (67%) felt that the DfE's guidance had been 'adequate', a further 16% thought it to be 'outstanding' and just under 1 in 5 (18%) felt that guidance was 'inadequate'. Given the enormous and unprecedented task the Department had to undertake, these ratings feel like a relatively positive statement on its guidance to schools.

While respondents rated government guidance relatively positively overall, they also left a number of comments throughout our survey on things they found challenging about the guidance, and ways it could have been better. This suggests that, while SBMs were understanding of the difficulties the government faced, there is room for improvement in the Department's handling of guidance as the situation continues to evolve.

Most commonly, SBMs' comments related to:

> Challenges around frequent changes to guidance

"So much information was constantly changing, then you can't find the details online when needed!"

SBM, secondary school, East of England

> Not having enough time to implement new guidance

"Schools receiving guidance at the same time as the general public was an issue, for example, educational provision for key worker children and the lag time from the announcement to the actual list of key workers being received."

SBM, primary school, north west

> Navigating the complexity and length of the guidance

"There are many links within each guidance and it can become confusing/contradicting leading to errors."

Operations manager, primary school, Yorkshire and the Humber

→

> "Updates to previous information were not highlighted, so you had to read the full report each time."
>
> SBM, secondary school, East of England

Although SBMs rated the guidance they received from their LA less positively than guidance from the DfE, we can still see that a combined total of 73% rated it either 'adequate' (60%) or 'outstanding' (13%) - again, a relatively positive statement given the challenge.

However, when we split these responses by those SBMs in a MAT and not, we can see a pronounced difference. 25% of SBMs not in a MAT (maintained or single academies) rated LA guidance as inadequate - compared with only 13% of SBMs in a MAT".

The chart overleaf shows responses specifically from SBMs in MATs, and indicates that while the majority rated LA guidance as adequate (55%), it is overall less positive than the rating of guidance from their trust central teams. Again, we didn't probe further, but we might speculate a few possible reasons for these outcomes:

> LAs were given no more lead-in time with central government guidance than schools, so would have struggled to translate guidance into the needs at a local level, quickly.

> Schools in trusts may have looked to their LAs more for 'centralised' guidance (e.g. on health and safety policy), for which the LAs themselves would have been reliant on government departments/agencies.

> Conversely, these same schools may have looked more to their trusts for tools and support to collaborate on solutions, or just to have the central team itself acting as an "end of the phone" support for its schools.

> Similarly, MAT central teams might have been able to focus more on localised issues and solutions, and areas where they had independence from central government, such as how to provide food to recipients of free school meals. They may have been freer, to some extent, to act and advise more quickly and decisively.

→

Rating of DfE
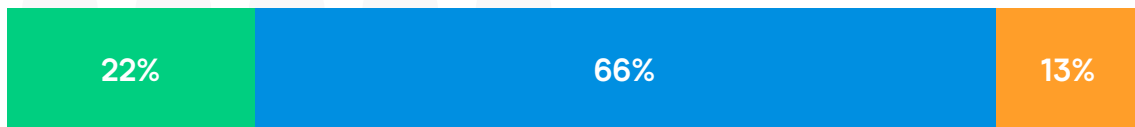
| 22% | 66% | 13% |

Rating of LA

| 14% | 55% | 18% | 13% |

Rating of MAT

| 36% | 42% | 9% | 13% |

■ Outstanding guidance ■ Adequate guidance ■ Inadequate guidance ■ N/A

Figure 14: *Percentage of SBMs who work for a MAT, rating guidance from the DfE, LA and MAT, July 2020, base = 302*

> ## "The hardest thing was a lack of support from the LA."
> **SBM, secondary school, London**

We also asked them what had been the most difficult thing for them, as an SBM specifically, to implement:

| 42% | 28% | 16% | 6% | 6% | |
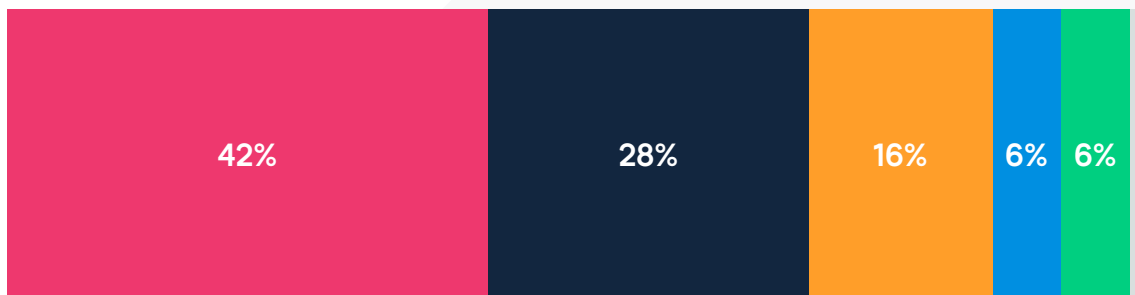
■ Accessing FSM vouchers ■ Organising staff ■ Implementing distancing
■ Accessing free devices ■ Nothing has been difficult ■ Accessing tech platforms

Figure 15: *Thinking about implementing government guidance, which of the following has been the most difficult for you as an SBM? Select only one option, July 2020, base = 1,410*

→

The biggest response came from the 42% who selected 'getting access to vouchers for free school meals'. Of course, the challenges of trying to access the government-contracted Edenred website are well-documented, but it seems our respondents were able to provide some colour to the specific issues faced[8]:

> "We finally got on to the Edenred website on 8 July."
>
> **SBM, alternative provision, London**

> "My colleague in the finance team was the star when it came to FSM vouchers - being an early bird was her trick to get on Edenred!"
>
> **SBM, secondary school, south east**

Nearly 1 in 3 (28%) said that 'organising staffing in line with relevant protective measures - e.g. skeleton staffing during partial closure, bubbles, etc.' was the most difficult task they personally performed.

> "Particularly hard was getting all staff back in for a partial opening in the midst of the pandemic, while asking them to do roles that had little to do with their usual job."
>
> **SBM, primary school, London**

We also had 18 comments telling us that it was impossible to pick just 1 task from our list - that all of the options were equally difficult.

---

8. *The Guardian, Free school meals scheme 'hard to use' say parents and heads (28 June 2020) – https://www.theguardian.com/education/2020/jun/28/english-schools-and-parents-criticise-free-school-meals-scheme*

Peer-to-peer support between SBMs in different schools fell during this period

Back in autumn 2019, it was clear from our ethnographic study that SBMs were very reliant on their local networks of fellow SBMs for support. This support ranged from trusted friends "on speed dial" who they could phone for reassurance about a decision, to organised support groups running physical, termly networking sessions - as well as their national equivalents run (often virtually) by organisations like ISBL or FD Forum. SBMs highlighted the need for these relationships and networks as they work in isolated roles, often the only person in their setting dealing with specific (and ever-changing) issues.

We wanted to see whether SBMs had been able to continue to rely on these relationships and networks during this phase of COVID-19. As the graph overleaf shows, while there is a small decline in the extent to which SBMs received support across each point in the scale, there is a significant uplift in the percentage of SBMs who received no support at all from other SBMs during this period - with 1 in 5 telling us in July 2020 that they had had 'none at all'. While we did not probe why, we can speculate that, as there were no SBMs with more knowledge or experience than their peers of dealing with a pandemic, the usual support networks were less able to provide practical advice here. →

Moreover, we know from our data on the additional hours SBMs were working that it's also very likely they were just too busy to support others during this time:

December 2019

13%	21%	32%	25%	8%
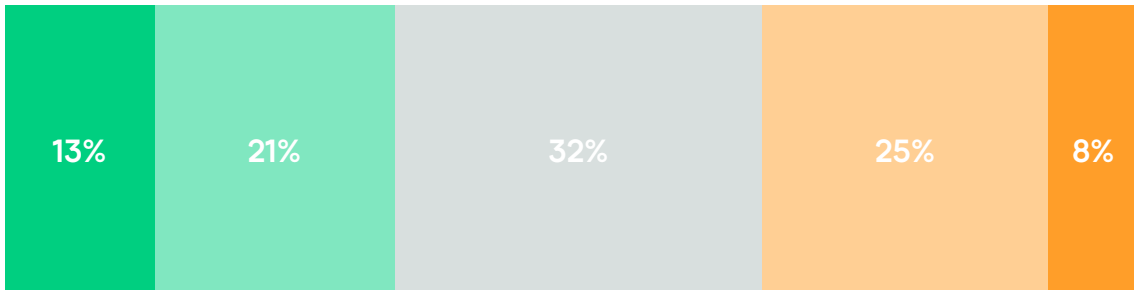
July 2020

12%	18%	26%	24%	20%
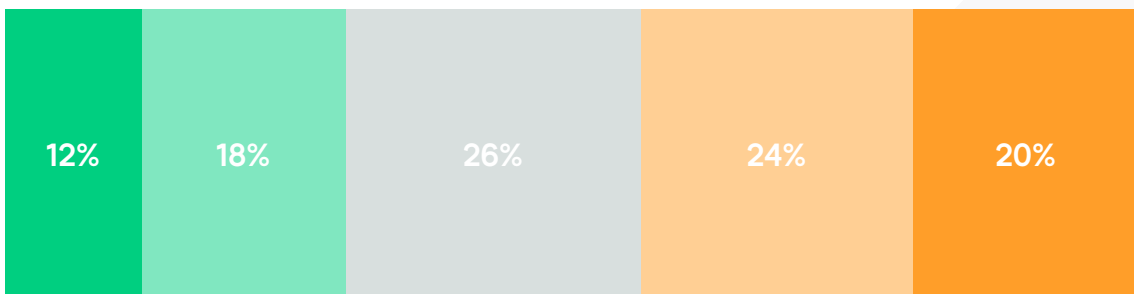
■ A great deal   ■ A lot   ■ A moderate amount   ■ A little   ■ None at all

Figure 16:   *Comparison of the extent to which SBMs have received support and advice from other SBMs, December 2019 base = 1,396, July 2020 base = 1,410*

→

Probing further, we asked respondents in both December 2019 and July 2020 to tell us the top 3 ways that they were receiving support from other SBMs[9].

| 61% / 20% | 40% / 1% | 50% / 33% | 69% / 59% | 10% / 4% | 9% / 9% |
| Local networking meetings | Meeting them in person | Talking on the phone | Email | Regional/ national networking | Other |

| 0% / 1% | 1% / 3% | 1% / 4% | 3% / 8% | 5% / 20% | 0% / 10% |
| LinkedIn | Text | Facebook | WhatsApp groups | No support received | Twitter |

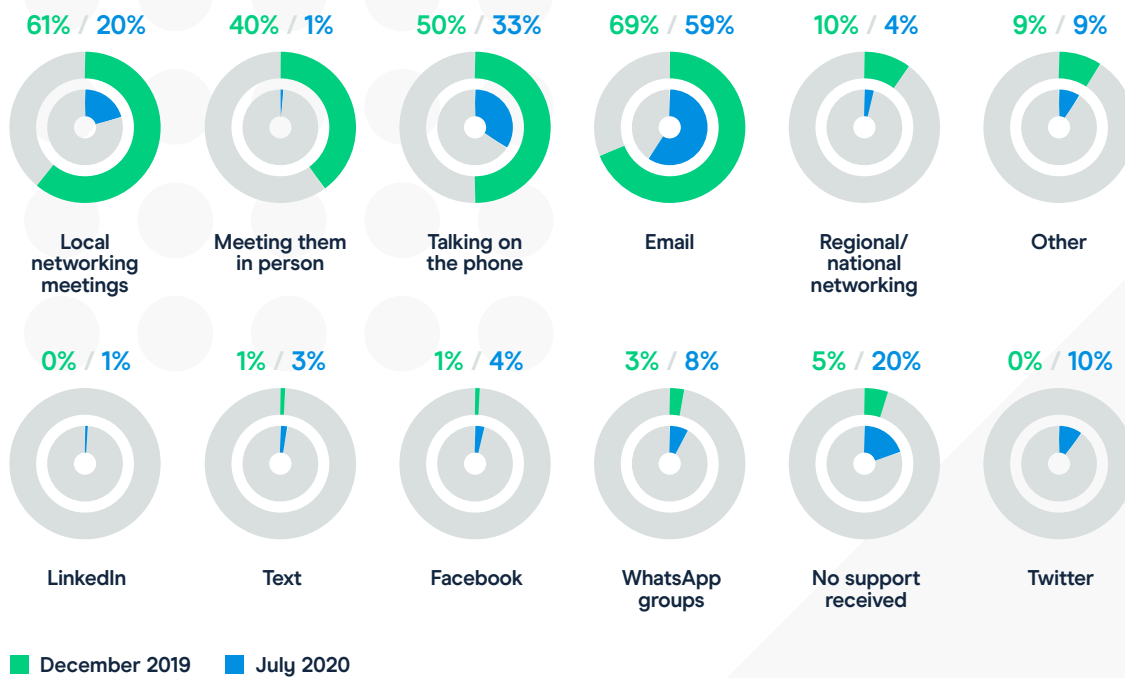■ December 2019   ■ July 2020

Figure 17:   Comparison of the extent to which SBMs have received support and advice from other SBMs, December 2019 base = 1,396, July 2020 base = 1,410

We can see that the top 4 ways SBMs had received support from each other in December 2019 all dropped significantly in July 2020 (email, local networking meetings/conferences, talking on the phone, and meeting in person - even if socially distanced). There were small rises in the proportions of those getting support from WhatsApp groups, Facebook, texts and LinkedIn, and 10% selecting Twitter[10]. By far the biggest means of receiving support was over email, with the majority (59%) selecting this as one of their top 3 methods. What is clear is that the support networks that SBMs had come to rely on were all hampered at a time when, arguably, they may have needed them more than ever.

9. In July 2020, we adjusted the options for 'local meetings/networking', 'regional/national meetings/networking' and 'meeting them in person' to include the terms 'virtual' or 'socially distanced', where appropriate.

10. Note that in December 2019 we did not include the option of picking 'Twitter', but added that in July 2020 after observing more traffic on this platform from SBMs.

Colleagues have a better understanding of what SBMs do now

When we interviewed SBMs in autumn 2019, many of them told us their colleagues around the school did not understand what they did, or the breadth and depth of their role. They felt this contributed to them being continually interrupted and asked to take on tasks that were not strictly part of their job description, adding to their workload. Our December 2019 survey found that a combined total of 46% said they felt their colleagues only understood their role 'a little' (33%) or 'not at all' (13%). We wanted to explore whether this perception had improved or grown worse during COVID-19, when the role of the SBM has been especially pivotal to the day-to-day operations of the school.

Our July 2020 data suggests that, at this point, SBMs felt their responsibilities were much more understood by colleagues than previously, with the combined total saying 'a little' or 'not at all' sliding from 46% to 32%, and the combined total of those saying 'a great deal' and 'a lot' jumping from 12% in December 2019 to 34%. One thing is for sure: this period has put SBMs and everything they do in the spotlight, and, on a positive note, it's likely they will now be held in higher esteem by their colleagues.
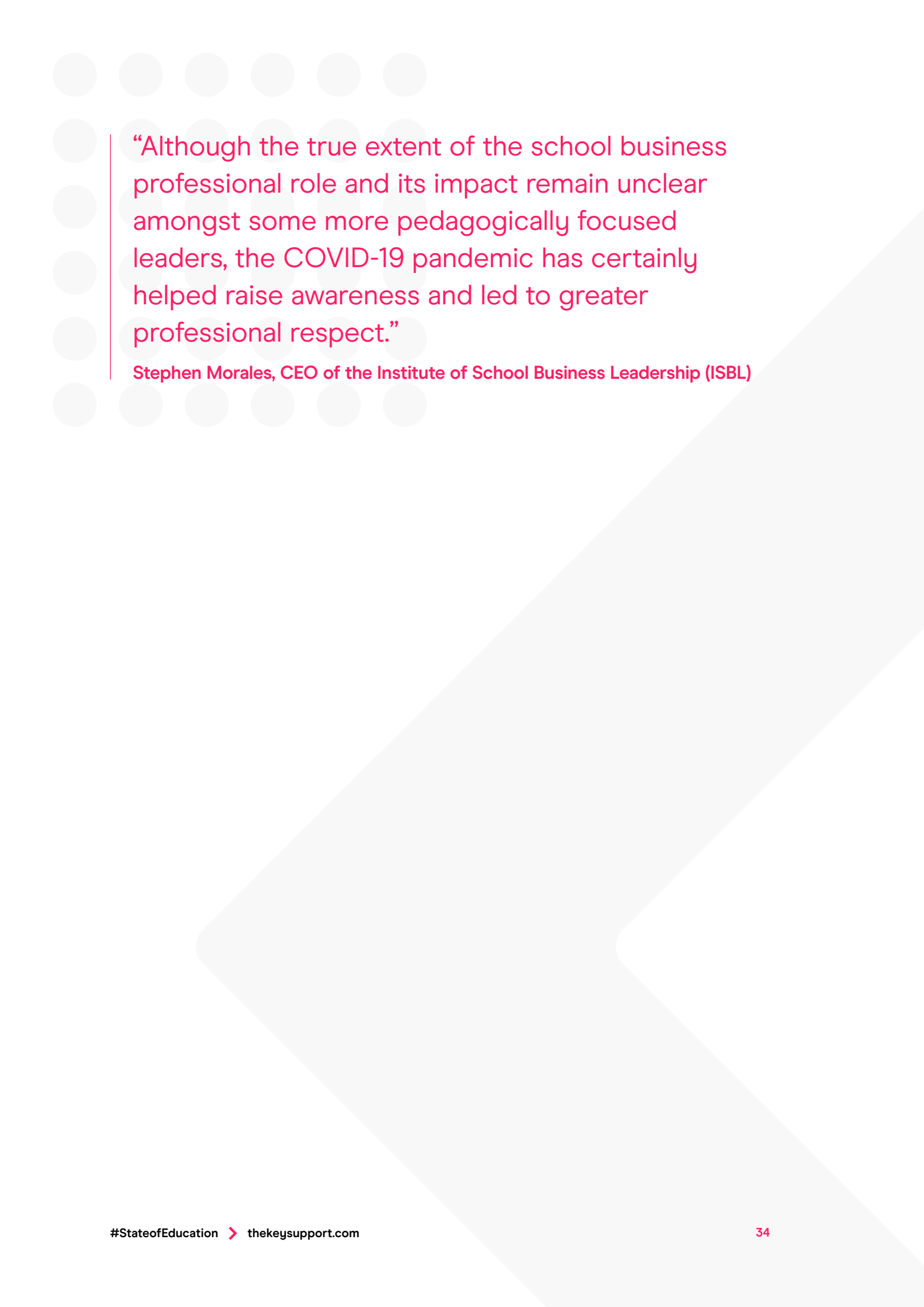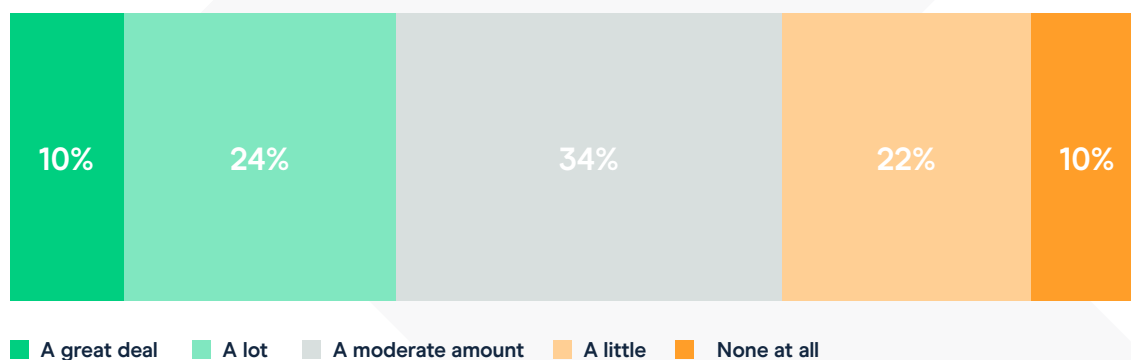
A great deal	A lot	A moderate amount	A little	None at all
10%	24%	34%	22%	10%

■ A great deal　■ A lot　■ A moderate amount　■ A little　■ None at all

Figure 18: *How well do you think colleagues across your organisation have understood your responsibilities during the COVID-19 pandemic?, July 2020, base = 1,304*

"Although the true extent of the school business professional role and its impact remain unclear amongst some more pedagogically focused leaders, the COVID-19 pandemic has certainly helped raise awareness and led to greater professional respect."

Stephen Morales, CEO of the Institute of School Business Leadership (ISBL)

Conclusions

The spring and summer terms of 2020 were a highly stressful time for SBMs. Our respondents' workload, like the workload of many in school leadership roles, exploded, with more than half (52%) working an extra day a week or more, unpaid, between the start of lockdown and the end of the summer term. They saw a shift in their usual responsibilities for which they are unlikely to have been trained - moving from a focus on finance, to premises management, as they adapted school buildings to address social distancing and other health and safety requirements. To compound this challenge, budgets were already tight and they encountered problems trying to procure the items needed to fulfil these requirements. Going into the next academic year, many report that their budgets are inadequate to cope with the ongoing impact of COVID-19, much less any new requirements that may materialise.

The list of challenges SBMs faced during this period is long, and in many cases, impossible to have overcome with any more efficiency or ease, given the extenuating circumstances. But 2 of their top 3 challenges, and 2 of their 3 biggest time-consumers, relate to issues that were beyond their control but might have been preventable: reviewing government guidance, which SBMs said could have been more immediately practical; and dealing with free school meals vouchers, where the challenge stemmed largely from struggles with accessing the Edenred website.

Similarly, SBMs were challenged by the frequency of change in government guidance and the short turnaround time to then implement that guidance. The first of these is difficult to avoid in such unprecedented times, but giving schools, and therefore SBMs, more lead-in time to prepare for changes would help in the event of further fluctuations. →

In a sector where experience counts for a lot, this period has been noticeable for the drop in SBMs getting support from colleagues in other schools, with everyone stretched and doing things for the first time. Some of this drop has been down to the practical issues around social distancing preventing face-to-face events and conferences from happening. But equally, a lack of anyone who has done this before, who is able to pass on their experiences around how to 'make it happen' has no doubt contributed to the stresses faced by SBMs - and compounded the strain of being in a role that's fairly solitary in most schools.

And last, but absolutely not least, wellbeing among SBMs is at a worryingly low level. We read comments from respondents that indicated a focus on wellbeing is often directed towards teaching staff, and perhaps senior leaders, but rarely SBMs. If governing boards are going to put more emphasis on monitoring the wellbeing of staff from September 2020, it would seem essential to evaluate SBMs and their colleagues as a distinct group within the school or trust, and keep close to any challenges they are facing.

> "I was working until dawn for weeks and when I approached the head to claim for the additional hours worked I received a stunned silence. Teachers are receiving a huge pay increase. What about the support staff! Totally unrecognised yet again."
>
> **SBM, primary school, north west**

Recommendations

There are many stakeholders - senior leadership teams (SLTs), governing boards, sector bodies and central and local government - who might be in a position to act on the insights in this research to help improve conditions for SBMs and the schools they manage. The Key is not a campaigning group, but we make the following recommendations in response to these insights:

SLTs and governing boards:

> Review pay, conditions and resourcing for your SBMs and those in similar roles. Review the hours they worked in spring/summer 2020, as well as any extra responsibilities they took on and the resources available to them, and factor all this into planning and appraisal decisions in the next period.

> Make wellbeing a priority for all staff, not just teaching staff. Bring a specific focus to the wellbeing of SBMs and their colleagues when reviewing the results of staff surveys or audits, planning next steps and reviewing policies and procedures.

National government:

> Make guidance more practical in the event of future lockdowns or as the situation otherwise continues to evolve.

> Provide a longer lead-in time for schools to implement government guidance.

> Make improvements to the capacity of the Edenred website, so that, in the event of further lockdown, SBMs and colleagues can access funding for free school meals vouchers without having to log in at times when usage is likely to be lower (i.e. outside of core work hours).

→

Local authorities and trusts:

> Give schools more flexibility over budgets going into this academic year and next financial year. Provide more support around short-term shortfalls in income and increases in expenditure.

Professional bodies and training organisations:

> Develop and offer more training and support for SBMs in premises management, specifically around the practical needs of adapting school buildings in line with government guidance, if this continues to be relevant, and including advice on managing site staff in this area.

> Set up or develop existing local, regional or national 'SBM champions', who have established credibility in solving some of the challenges associated with this period and could share best practice with the sector.

Sample and collection

This project has involved multiple phases, and this report draws from all aspects:

1. Ethnographic study, autumn 2019

   a. We spent 1 full day with each of 3 SBMs in schools in Kent, London and Nottinghamshire.

   b. Participants were recruited via email and included a mix of members and non-members of The Key.

   c. All participants were from primary schools, operating in the maintained and MAT sectors, across 1, 2 and 3-form entry settings.

2. In-depth interviews, autumn 2019

   a. We interviewed 7 SBMs for up to an hour, over the phone and in person at their school.

   b. Participants were recruited via email and included a mix of members and non-members of The Key.

   c. Participants came from a mixture of primary and secondary schools of all sizes, operating in the maintained and MAT sectors, across urban, suburban and rural settings in England.

→

3. Survey 1, December 2019

    a. We sent a survey, by email, to 12,153 people who were coded on our database as being a school business manager in a school in England, on 2 December, with 2 subsequent follow-up emails. Email open rates were 19.7%, 22% and 16.8% respectively, and the survey was in the field for 3 weeks.

    b. The survey went to both members and non-members of The Key. We asked anyone who was not an SBM or in an equivalent role to withdraw, and then we saw a total response of 1,434, a rate of 11.8%.

    c. Not all respondents completed the full survey, and we saw a drop-off of 178 participants (taking account of branching, e.g. where some questions did not apply) by the end, giving a total completion number of 1,256. We have indicated the number of respondents to each question throughout this report.

    d. The survey contained up to 44 questions, taking account of branching, and was designed to be completed in 15 minutes.

    e. 79% of respondents described themselves as a 'school business manager/leader", with the remainder mainly in finance roles or similar, and 5% managing multiple schools.

    f. 25% of respondents were in a MAT.

    g. We have not weighted the survey responses, and did not capture whether respondents were in the primary or secondary phase, or which region they were based in, so the data should not be taken to be statistically representative. However, based on the December and July surveys going out to a similar sample, and respondent numbers being very close, we might assume that the respondents are broadly representative of the general SBM population (see point 4.i, below).

→

4. Survey 2, July 2020

   a. We sent a modified version of the first survey, by email, to 14,958 people who were coded on our database as being a school business manager or similar in a school in England, on 7 July, with 2 subsequent follow-up emails. Open rates were 25.7%, 5.9% and 9% respectively, and the survey was in the field for 3 weeks.

   b. The survey went to both members and non-members of The Key. We asked anyone who was not an SBM or in an equivalent role to withdraw, and then we saw a response of 1,559, a rate of 10.4%.

   c. We also posted a link to the survey on The Key's Twitter account, as well as in the Primary School Leaders Facebook group (c.30,000 school leaders). In addition, ISBL promoted the survey to its members via its newsletter.

   d. Not all respondents completed the full survey, and we saw a drop-off of 262 participants by the end, giving a total completion number of 1,297. We have indicated the number of respondents to each question throughout this report.

   e. The survey contained 19 questions and was designed to be completed in 5 minutes.

   f. 80% of respondents described themselves as a 'school business manager/leader", with the remainder in finance roles or similar, and 5% managing multiple schools.

   g. 69% were in primary schools, 18% in secondary schools, and the remainder in all-through schools, special schools, or alternative provision.

   h. 22% of respondents were in a MAT.

   i. We have not weighted the survey responses, so the data should not be taken to be statistically representative. But, with the exceptions of a higher percentage of respondents being from the south east and London, a slightly higher proportion being from secondary schools than in the sector, and a smaller proportion being in MATs than in the general school population, we might consider the findings to be broadly representative of the general SBM population.

About The Key

The Key is **the leading provider of knowledge and tools** for education leaders determined to make a difference.

We provide the latest policy information and practical how-tos, as well as data insights powered by a modern management information system, to give leaders in education the confidence to lead and **the knowledge to act.** We support more than 16,000 schools across the country to drive school improvement and make a meaningful impact.

In the years since our founding, our community of ambitious and aspiring members has grown to more than 160,000 leaders of schools and multi-academy trusts. We are deeply committed to serving the needs and championing the perspective of education leaders across the country. Our vision is to be an indispensable partner to education leaders determined to make a difference.

Follow our updates: **@thekeysl**

thekeysupport.com