

UNISON School Business Manager Survey, Summer 2015

EXECUTIVE SUMMARY

UNISON carried out a survey of school business managers (SBMs) in summer 2015. It aimed to monitor SBM workplace issues and to find out from members how UNISON support could be improved.

KEY FINDINGS

The survey evidences workload as a key concern for SBMs, with 87.4% of respondents working more than their contracted hours and the majority not being rewarded for this additional work. This emphasis on workload as a concern ties in with one of the motions carried at the 2015 Local Government Conference to continue the campaign for a reduction in support staff workload.

The survey also highlighted the significant differential in salaries between the primary and secondary sectors, with 61% of SBMs working in secondary schools earning over £35,000, compared to 8.5% of SBMs in primary schools. Overall the most common salary range is less than £20,000 (25.1%).

UNISON SUPPORT

When asked an open-ended question on the resources that UNISON could provide to SBMs to support them in their role, there were a range of responses that largely fell into four main categories:

- Campaign for higher salaries
- Support on contract-related matters
- Help SBMs network with each other
- Support on specific work place issues e.g. bullying and harassment

When asked for initiatives that could help support SBMs and make their workload more manageable, suggestions included:

- More office support to allow the SBM to focus on strategic work
- Support networks for SBMs
- CPD for office staff and for school leaders so they understand the scope of the SBM role
- A checklist of daily, weekly, monthly and termly tasks
- Flexible working
- A specific campaign to raise awareness of the SBM role as professional, essential and strategic

For more information about the survey, please contact education@unison.co.uk

FULL REPORT

BACKGROUND AND CONTEXT

The survey opened on 30 April 2015 and closed on 22 May 2015. Questionnaires were sent out to 1,529 school business managers. 843 responded which is just over a 55% response rate. A key concern arising from the survey was about workload for SBMs, leading to further analysis of this issue explored on pages 12-14.

SCHOOL TYPE, PHASE AND STATUS

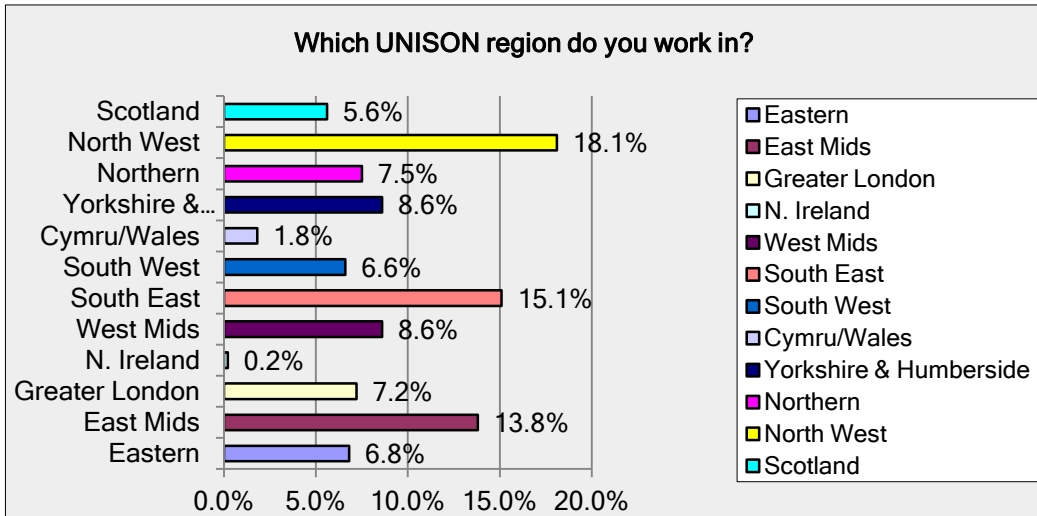
- The majority of respondents work in a primary school (72.6%). 19.3% work in a secondary school, 5.5% in a special school, 1.3% in an all-through school, 1.1% in a pupil referral unit and 0.5% in a children's centre. The split between primary and secondary respondents closely reflects the proportion of primary and secondary schools across the UK. Proportionately, there is a larger response from secondary schools than primary schools.¹
- 21.5% of respondents work in an academy or in a school in the process of converting. The remainder, 78.5% work in a community school. Of those who work in an academy, when asked if the move to academy status had affected their workload, just over 75% said that their workload had increased:
 - *"...more accountability, more reporting, more things to remember to do"*
 - *"I have become line manager of the site supervisor creating more facilities work and more involved in payroll issues. A new finance package has created more complex financial issues"*
 - *"...support from the Academy hasn't been as much as I would have expected"*
 - *"I am currently off work with stress caused by the workload increase since September 2014 when we were taken over by an academy who haven't got the first idea how to run a primary school"*
 - One respondent did acknowledge that whilst her workload had increased, her work was more "meaningful". She also commented *"Workload is manageable and more enjoyable"*.
 - For those respondents who did not indicate an increased workload, most of them had joined their roles post-conversion.

¹ This finding is consistent with the suggestion in the DfE's 'Review of efficiency in the schools system', June 2013, that 90% of secondary schools have access to an SBM compared to 40% of primary schools:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/209114/Review_of_efficiency_in_the_schools_system.pdf

GEOGRAPHICAL SPREAD

The regional breakdown shows that generally there is a good spread of respondents across the regions.



JOB TITLES

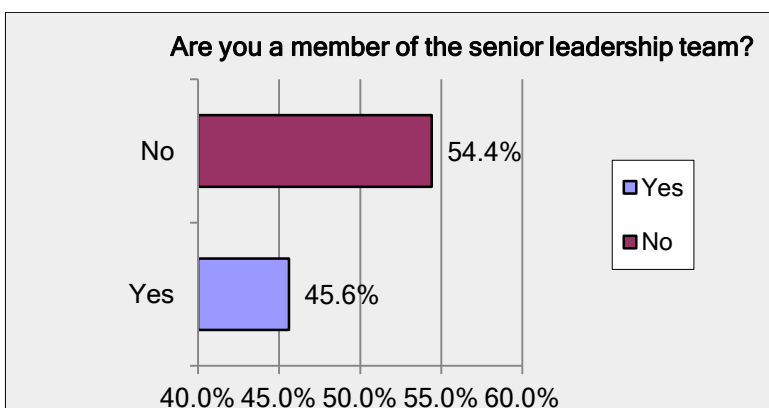
The top five job titles that respondents used to describe their role were:

- School Business Manager (used by 31.5% of respondents)
- Office Manager (used by 13.0% of respondents)
- Bursar (used by 12.1% of respondents)
- Finance Officer/Director (used by 7.6% of respondents)
- School Administrator (used by 5.5% of respondents)

A variety of other descriptions were given, reflecting the complex landscape of those carrying out an SBM role.

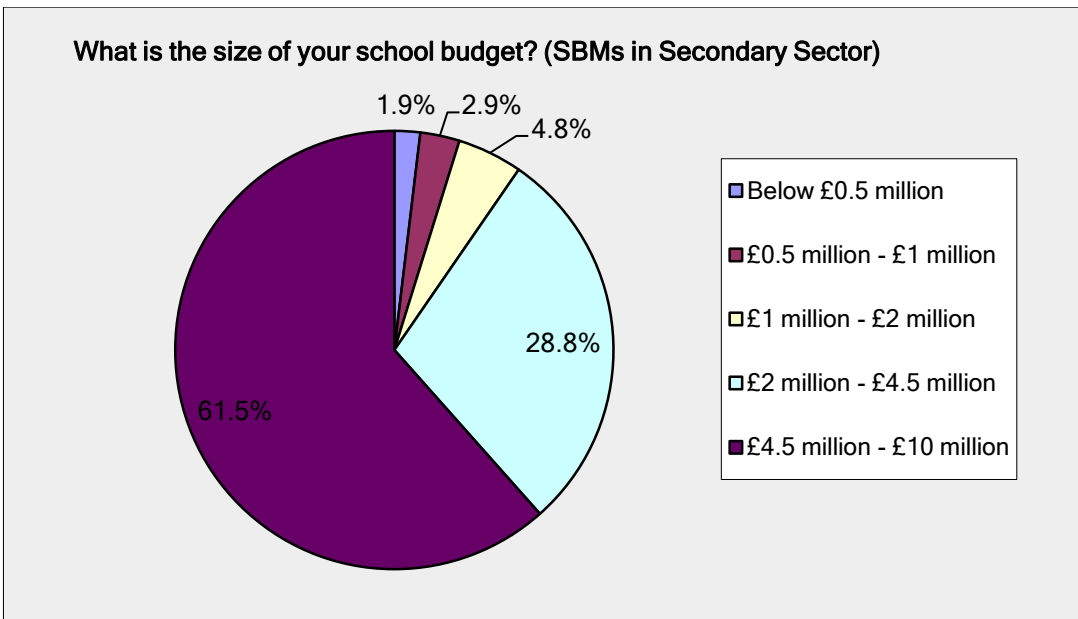
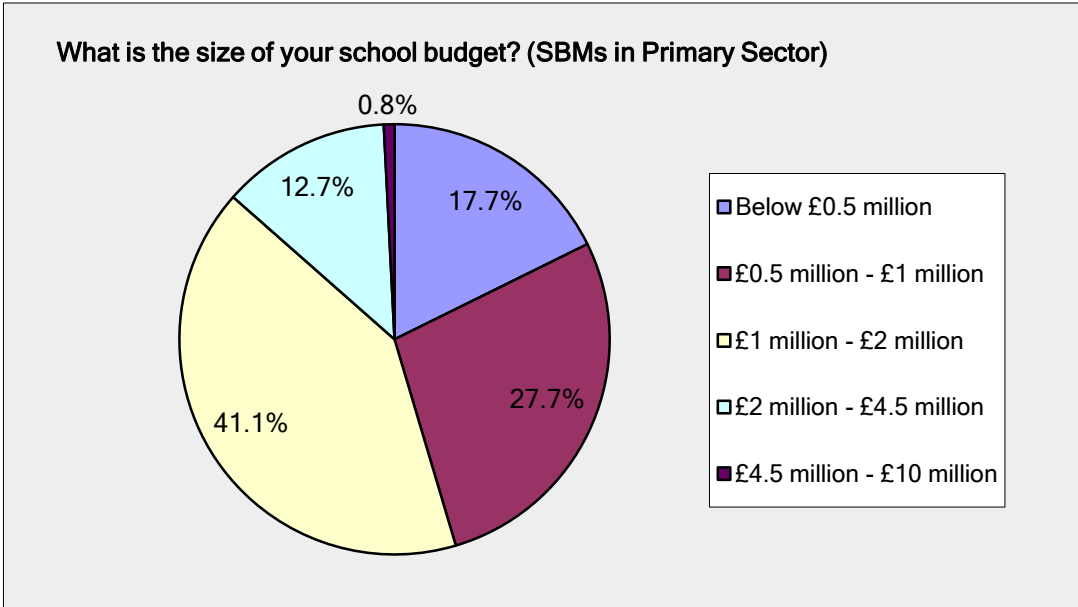
MEMBERSHIP OF THE LEADERSHIP TEAM

Overall, fewer than half the respondents are a member of the leadership team (45.6%). The proportion is slightly higher in secondary schools where 52.2% are members of the leadership team, compared to 43.5% in primary schools.



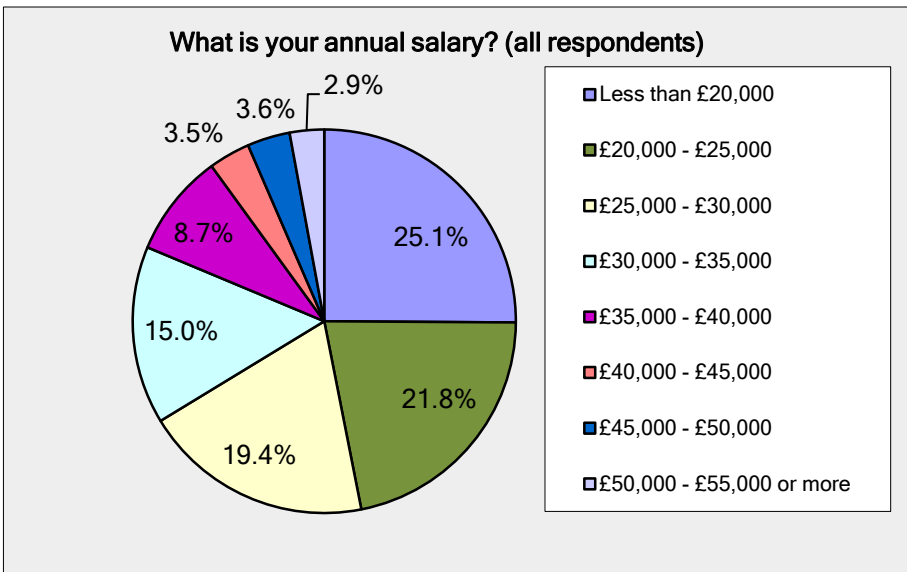
SIZE OF BUDGETS MANAGED BY RESPONDENTS

As would be expected, there are clear differences in the size of budgets managed by SBMs in the primary and secondary sectors. The majority of SBMs in primary schools are managing a budget of £1 -2 million (41.1%), while the majority of SBMs in secondary schools are managing a budget of £4.5 – 10 million (61.5%).

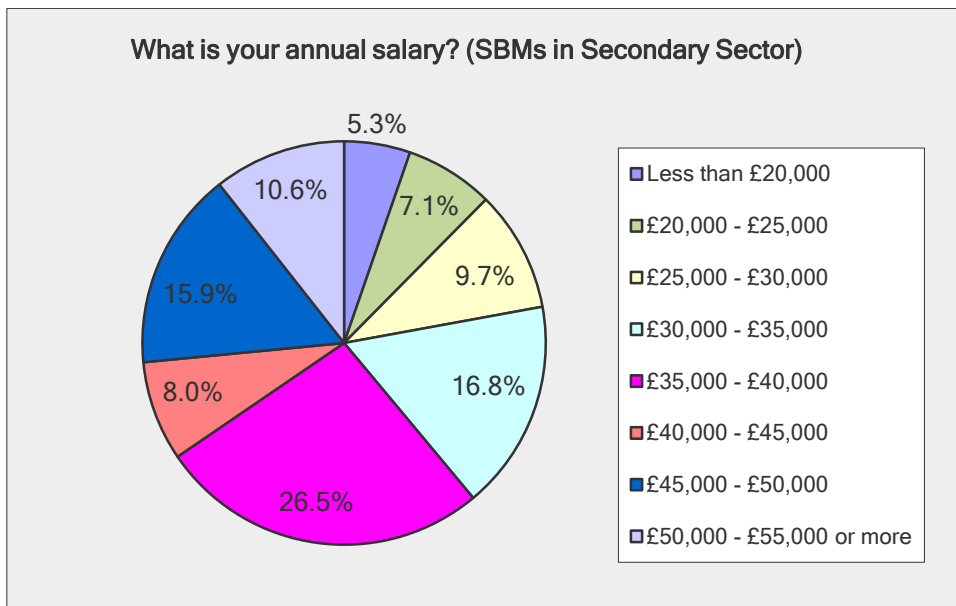


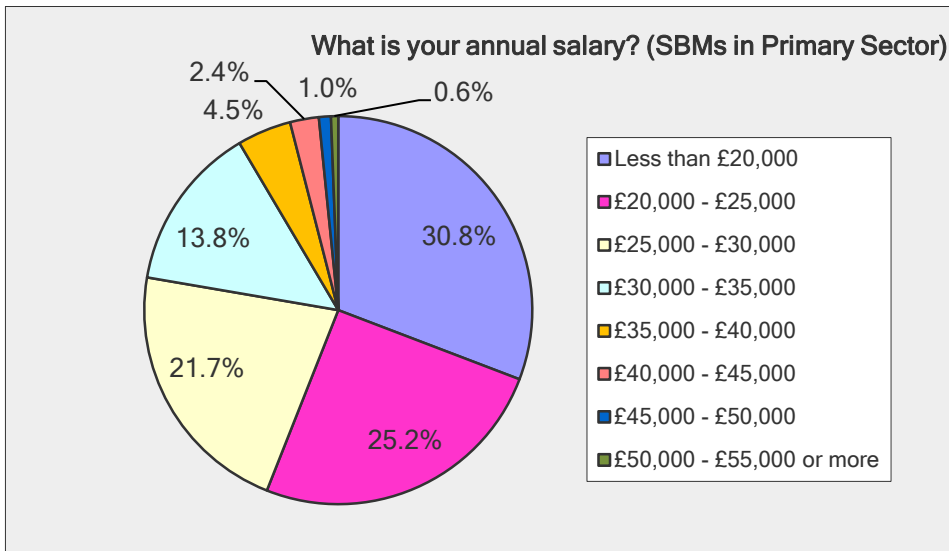
SALARIES

The most common salary range is less than £20,000 (25.1%):



When comparing salaries between the primary and secondary sectors there is a significant differential. 8.5% of respondents who work in primary schools earn more than £35,000 compared with 61.0% in the secondary sector:



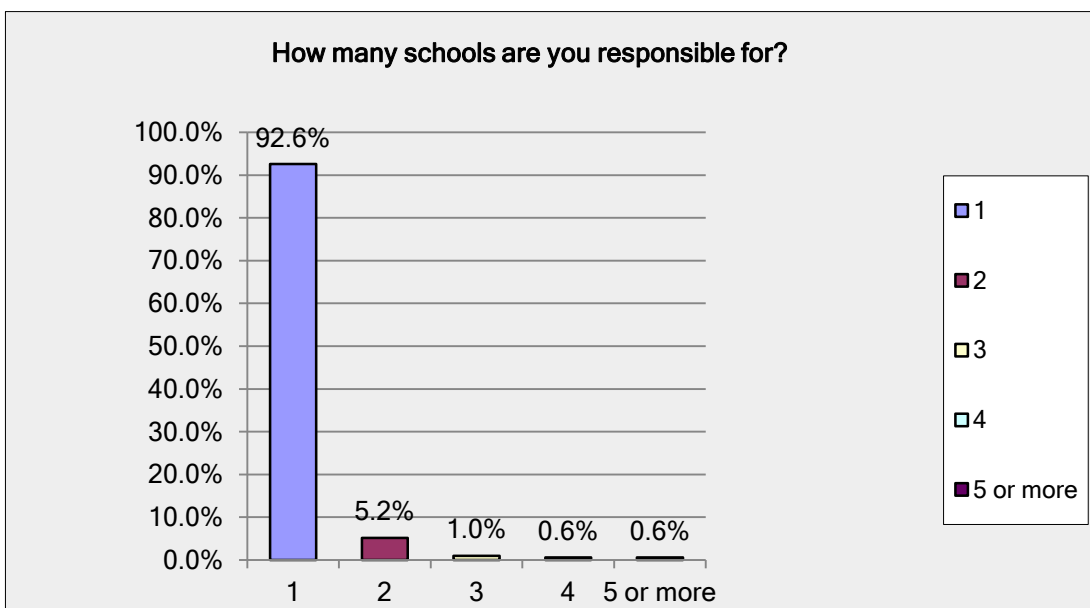


Although the survey did not specifically ask if people worked full or part time, analysis based on the number of hours people work revealed that where SBMs work less than 30 hours, only 2.7% earn more than £35,000 whereas for those working more than 30 hours, almost 22% earn more than £35,000.

It is worth noting that 81.3% of all respondents earn less than the minimum pay range on the leadership scale (£38,215 in September 2014²).

NUMBER OF SCHOOLS MANAGED

- The majority of respondents (92.5%) were responsible for one school.
- Of the 7.46% responsible for more than one school, 70% were responsible for two schools, 14% for 3 schools, 8% for 4 schools and 8% for 5 or more schools.



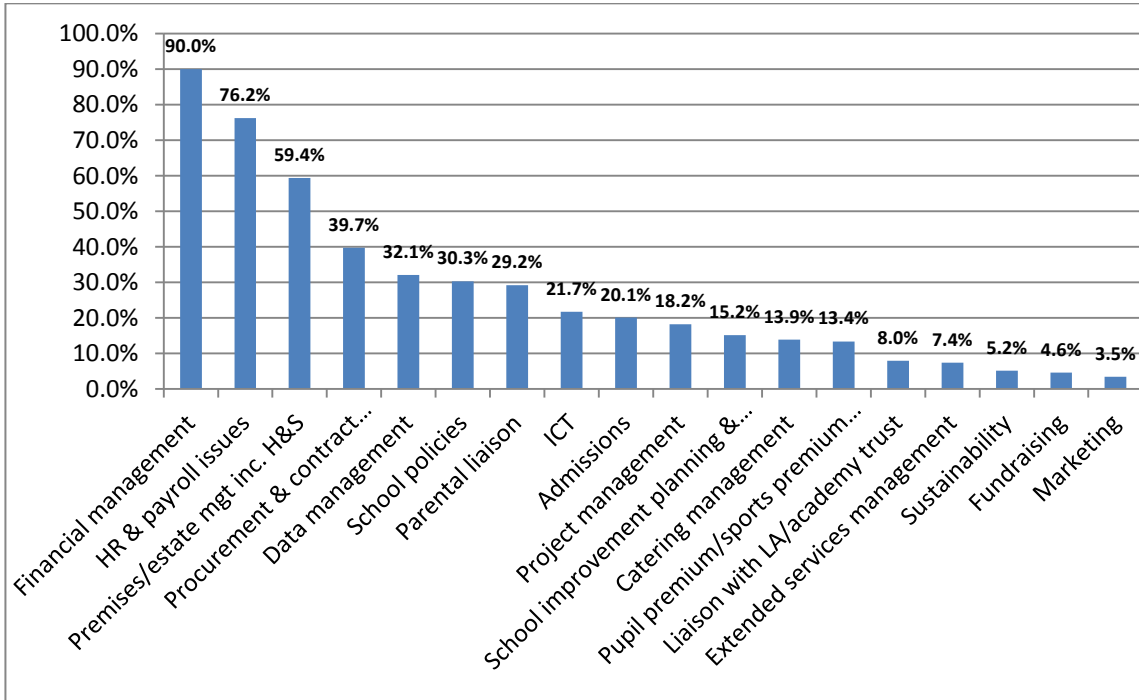
² https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/341951/School_teachers_pay_and_conditions_2014.pdf
 School Teachers' Pay and Conditions Document *Department for Education* (September 2014) – accessed 29/5/15

ISSUES THAT TAKE UP MOST SBM TIME

Respondents identified the top 5 issues that take up most of their time as:

- Financial management
- HR & payroll issues
- Premises/estate management
- Procurement and contract work
- Data management

However, the table indicates many other substantial additional responsibilities:



LEVEL OF CONCERN ABOUT KEY ISSUES

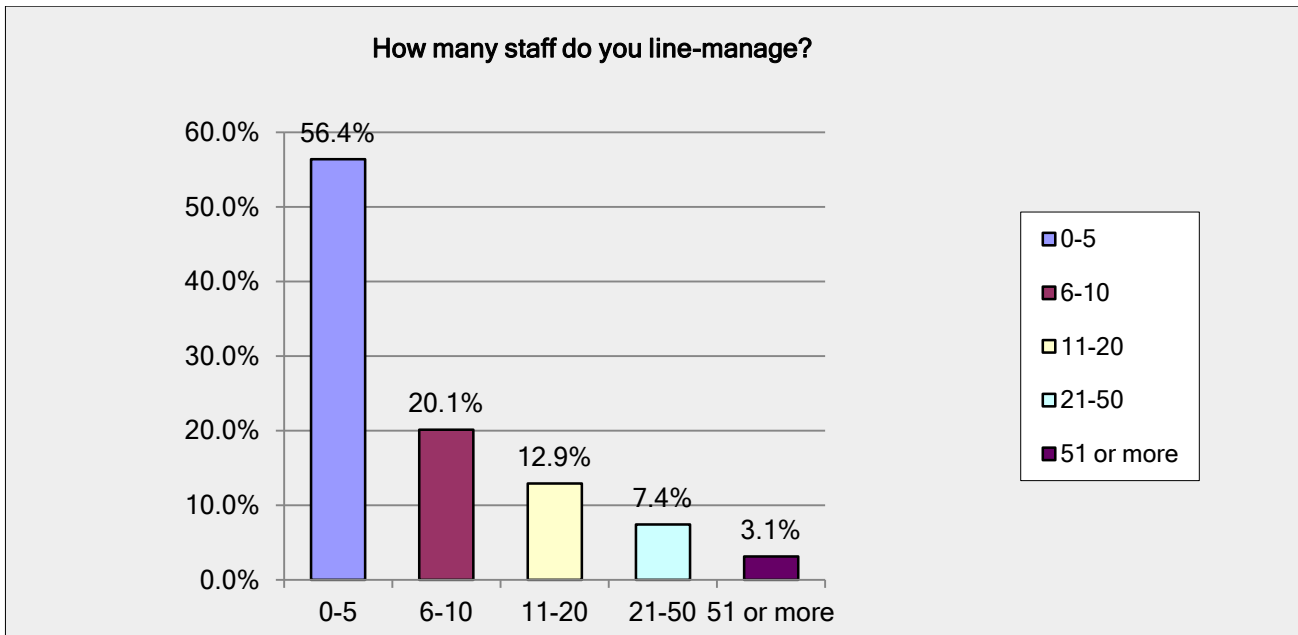
Respondents were asked to identify their level of concern about nine key issues.

The top four issues of concern were:

- Workload (90.9% of respondents expressed concern about this issue). See page 12 for a more detailed analysis of SBM workload concerns.
- Frequent new initiatives from government/academy trust/local authority/school (85.9% of respondents expressed concern about this issue).
- Too many areas expected to specialise in (82.5% of respondents expressed concern about this issue).
- Low pay in comparison to the rest of the leadership team (77.8% of respondents expressed concern about this issue).

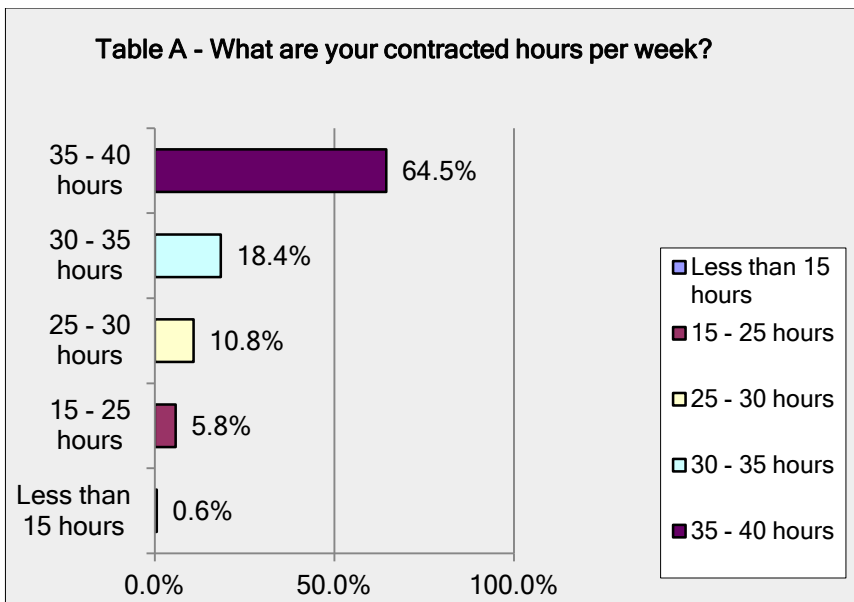
STAFF MANAGEMENT

The table below shows that the majority of respondents have line management responsibilities for up to 5 staff members (56.4%), while 3.1% are line-managing over 51 staff members.



HOURS WORKED

Contracted hours per week are illustrated in table A. The majority of respondents are contracted to work 35-40 hours a week (64.5%).



The number of respondents who work more than their contracted hours are illustrated in Table B. The vast majority usually do so (87.4%).

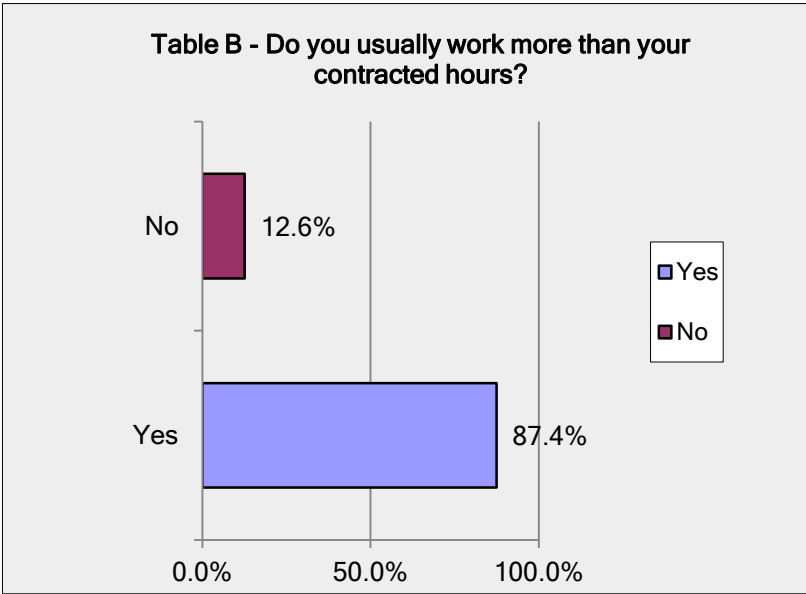


Table C illustrates the number of additional hours worked each week. 39.1% of respondents usually work an additional 1 to 5 hours per week, with 36.9% usually working an additional 5 to 10 hours. 24.1% usually work more than 10 additional hours each week.

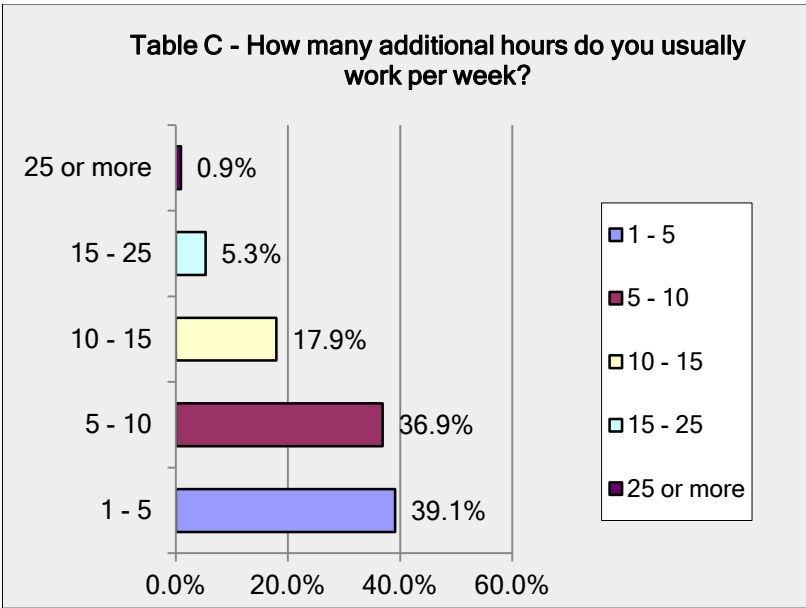
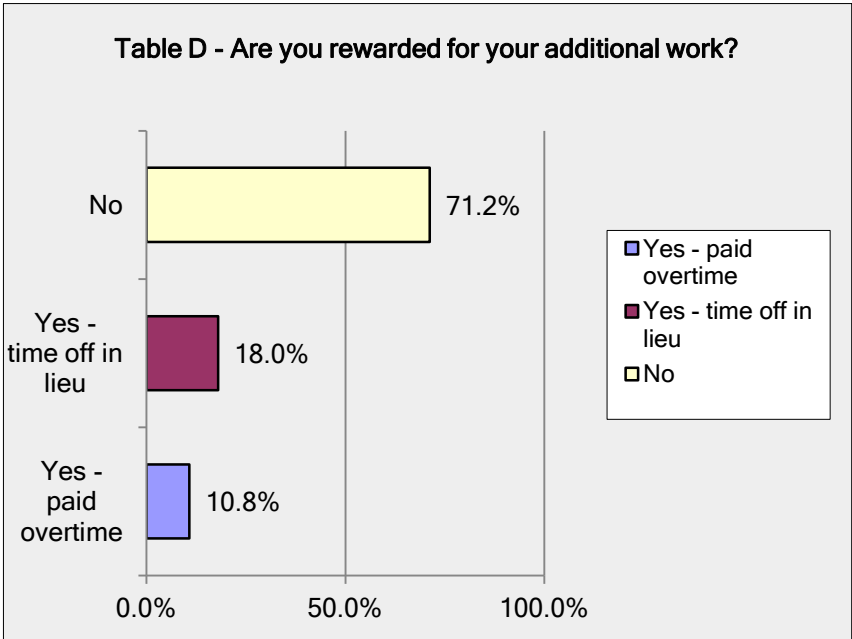
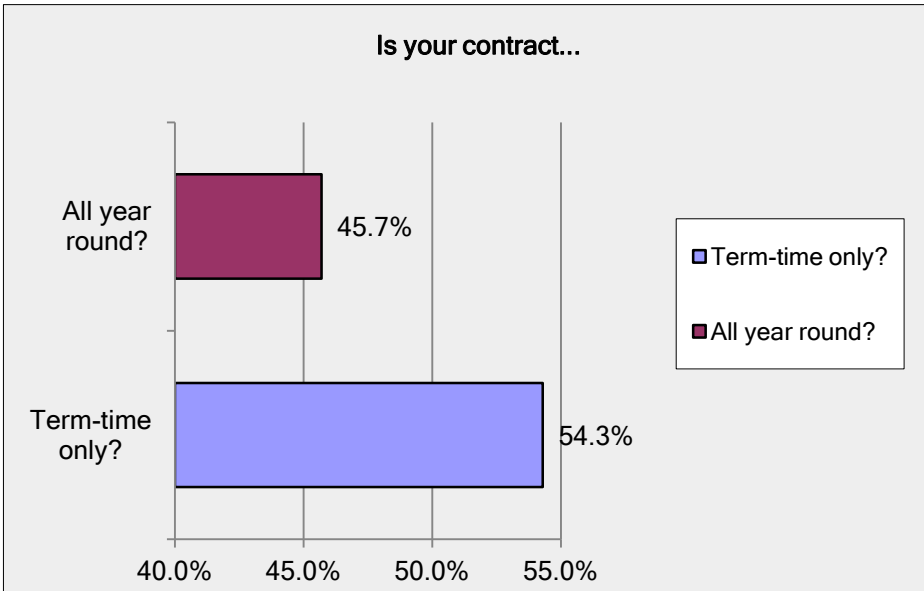


Table D illustrates whether or not respondents are rewarded for overtime worked. 71.5% of those who work additional hours are not rewarded in any way.



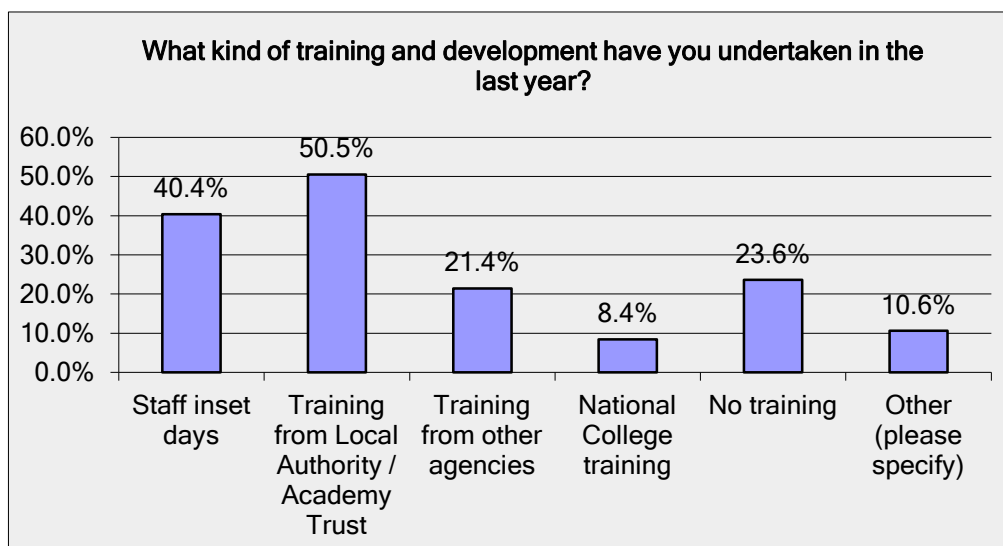
TYPE OF CONTRACT

Overall, the number of respondents on term-time only contracts (54.3%) is only marginally larger than those on year round contracts (45.7%). However, in primary schools, 62.1% are on term-time contracts, compared to 19.6% in secondary schools.



PROFESSIONAL DEVELOPMENT

76.4% of respondents indicated they had received some form of training and development in the last year:



Examples of 'other' types of training and development include conferences, networking and self-training.

PROFESSIONAL ASSOCIATIONS

Just over 36% of respondents were a member of at least one professional body such as the National Association of School Business Managers (NASBM) or the Institute of Administrative Management (IAM).

MEMBERSHIP OF A LOCAL SBM NETWORK

51.4% of respondents were part of a local SBM network.

UNISON'S SKILLS FOR SCHOOLS WEBSITE

79.7% of respondents were not aware of UNISON's Skills for Schools website launched in early 2015, showing there is clearly still work to be done in raising the profile of the website. The website is a helpful tool for SBMs with responsibilities for the professional development of other support staff (www.skillsforschools.org.uk).

UNISON SUPPORT

When asked an open-ended question on the resources that UNISON could provide to SBMs to support them in their role, there were a range of responses that largely fell into four main categories:

- Campaign for higher salaries
- Support on contract-related matters
- Help SBMs network with each other
- Support on specific work place issues e.g. bullying and harassment

APPENDIX – FOCUS ON SBM WORKLOAD CONCERNS

At UNISON's Local Government Conference in June 2015, a motion was passed to continue to campaign for a reduction in support staff workload. Key action points include:

- Working with UK governments on strategies to reduce workload problems;
- Making it clear to governments that strategies for reducing workload for teachers should not negatively impact on support staff;
- Producing materials for branches that address workload issues

In the SBM survey above, workload was the top concern, with over 90% of respondents expressing some level of concern.

The SBMs that had expressed that they were "very concerned" about workload were emailed a series of questions relating to their role and their workload. The replies received consistently reported similar concerns.

When asked "what are your concerns about workload?" responses included:

- *My concern is very simply that the amount of work grows each term and is now at a point where there is a continual backlog. I am dealing with increased pupil numbers (and their parents), building repairs and expansion, the school website and fundraising to constantly upgrade the IT (including associated repairs and software issues). My 'core' responsibilities of budgeting and HR are being squeezed out of the working day. I feel as though I am always fighting fires and never find time to work strategically.*
- *My workload is ever increasing in both volume and senior duties. I am only paid for the hours that I am contracted to do rather than what I actually do. There is no money in the budget to pay overtime and I feel my pay is not linked to my being a member of the SLT, as would a teacher's salary*
- *My concerns revolve around the shift to academies in the school environment and the change in skill sets required of business managers, especially as they are now running a business rather than a department of the local authority. Also the requirements of the managers have changed, with an emphasis placed on outward-facing activities like networking and marketing. In many cases, schools have not altered their admin teams to accommodate this new world and this has placed significant pressures on existing staff. Constant changes in the government's policies and processes also place unnecessary strain on people.*
- *I have more work than I could do in a lifetime. I get constant interruptions which take me away from tasks that I have planned for the day; I get over 100 emails a day and almost every one of them requires an action or piece of work.*

When asked “in what way(s) has your workload increased/changed in the last 5 years” SBMs consistently reported an expanding workload:

- *My workload has doubled.*
- *I am expected to attend SLT meetings and also full governing body meetings as the finance representative of the school, which is always in my own time. There is very little specific finance training and guidance from county. I am expected to do all the traditional school secretary roles i.e. lunch monies, attendance, lost PE kits whilst also needing a degree in accountancy skills.*
- *The opening of a pre-school and the expectation that all associated administrative tasks - finance, HR, payroll, parent queries - will be absorbed into my existing role. Responsibilities have increased. Workload has dramatically increased. The PTA adds to the workload, as well as before/after-school clubs. The unwitting adoption of responsibilities including health & safety, managing hiring contracts, assessment data etc has all added to the workload. Responsibility for all things financial has taken over the role.*

When asked if an “increased workload had an effect on your health and/or family life” all the respondents agreed that it had. Some of the more detailed responses were:

- *My family frequently remark that I should come home earlier, stop going into school during the holidays etc. If I did that there would be an even worse backlog than currently exists and the budget does not allow for another member of staff. I was treated for cancer earlier this year and even the hospital staff advised me to take off more time than I felt I could. I frequently feel stressed and have recently felt physically drained.*
- *My health has suffered and I am a different person, not in a good way! I have just resigned. I have no job to go to, no savings and no plan. I don't know what I am going to do. The job is too big for one person to do it properly. I also feel isolated on SLT. I am devastated to be leaving.*
- *I work additional hours daily and also have to work Sundays if I am to have any chance of keeping my head above water.*
- *My personal life has completely been taken over by the increased workload, lack of support and inability to be heard by headteacher and governors. I have had a week off work due to stress and many, many sleepless nights. Working from home at night/weekends became the norm. I've had 3 and a half years of not taking a lunch break to try to keep up with workloads.*
- *My workload impinges on my private time and can cause significant stress and worry, not to mention long hours.*
- *The stress I take home is immense and I think it does affect my family life and definitely my health. I have never suffered from so many feelings of ill health or been so tired as I have since I have been in this job.*

When asked for initiatives that could help support them and make their workload more manageable, suggestions included:

- More office support to allow the SBM to focus on strategic work
- Support networks for SBMs
- CPD for office staff and for school leaders so they understand the scope of the SBMs role
- A checklist of daily, weekly, monthly and termly tasks
- Flexible working
- A specific campaign to raise awareness of the SBM role as a professional, essential and strategic role

Respondents were also asked what they love about their role and the range of answers given show the dedication and commitment of SBMs. Responses also show the pride that SBMs take in their achievements and the recognition of the impact that their work can have on children and young people's lives. Here are just a few of their comments:

- *I love the diversity of my role and I am proud of my school and its reputation. That is why I work so hard to support it. I enjoy being able to assure parents that the very best is being done for their children. The children, mostly, can be delightful and are a reminder of why we are really doing this. My personal favourite part of the job is the financial side - I love it when numbers add up.*
- *I absolutely love my role, I love the work, the atmosphere, the children, the ability to make a difference.*
- *I love the work environment, the people and the children in my school; it is an interesting, diverse and very enlivening place to work. I also love the fact that if I do a good job then our children benefit.*
- *I enjoy the fact that my day is never the same twice, that I have gained numerous skills since taking up my post and that I am involved in almost all aspects of school planning and decision-making to some degree or another. I feel my school has changed for the better since I joined the staff and that, as a result, students are safer, better able to achieve in a vibrant and cared for environment, with expenditure planned and strategies identified to give them the best possible opportunities. Likewise, staff feel supported and guided in those areas that are my responsibility. This is hugely important to me, and I thrive on making things better and easier for staff and students and in finding solutions to the challenges schools and academies face.*

Tackling workload is crucial. Staff who are feeling overburdened are prone to stress and stress related illnesses. There is also the danger that eventually, SBMs could decide to leave the profession which would be a waste of the resources spent training them in terms of lost skills, expertise and experience.

The development of professional standards led by National Association of School Business Management is a positive move. However, with the development of professional standards comes responsibility: a responsibility to pay a salary that truly reflects the standards aspired to and the responsibility to properly support SBMs in their role, especially in terms of their workload.