

Inspiring leaders to
improve children's lives



Schools and academies

Securing the best for less: making resources go further

Resource

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The Blackpool Federation
Cotgrave Candleby Primary School
Darlington Education Village
Outwood Academies Trust
Sir William Burrough Primary School
The Ferrers Specialist Arts College

Executive summary

Over the last 12 months, during a period of global economic constraint, the effective and efficient use of resources in schools has become an increasingly high-profile issue. It is clear that in the future school budgets will be tighter and, when coupled with falling rolls, school leaders will be faced with some difficult budgetary decisions. For many headteachers, a period of limited growth or even budget reductions will be a relatively new experience. At the same time, it is reasonable that government and the public should expect schools to make the most effective and efficient use of the funding made available to them.

The National College is working with school leaders and national partners to promote the effective and efficient use of resources by raising awareness and understanding; changing cultures to give greater value to cost-effectiveness; enhancing professional skills; and ensuring schools have access to appropriate tools and resources. The College is actively developing support for school leaders in this area.

As part of that support it has been working with six case-study schools to understand how they have used their resources efficiently and effectively. All the schools have developed an approach that is tailored to their context and needs – there is no single blueprint for efficiency – but all have been driven by clear values that are focused on wanting the very best outcomes for children.

The case studies explore and document the effective use of resources within the following categories:

- procurement and technology
- resource use and financial management
- partnership and shared services

A number of key themes, common to all the schools, emerged from analysis of the case studies. Each school was characterised by:

- financial decision-making driven by values
- a strategic approach to decision-making about the deployment of resources
- an entrepreneurial culture and a ‘can-do’ attitude, which brought in additional income
- robust systems and structures, acting as a framework for financial decision-making

- a commitment to identifying, developing and using knowledge and expertise in relation to managing budgets and a willingness and determination to seek out and draw upon available social and intellectual capital
- shared understanding and a shared sense of responsibility for the management and use of resources
- openness to challenge and willingness to challenge established practices, systems and structures or the outcomes of decision-making elsewhere

All are discussed in detail in the report.

In addition to this, the case-study schools identified strategies and tips that helped them use resources efficiently. These are detailed below and examples of each are in the full report:

- Establish the values and vision before identifying how the available budget will be used.
- Develop new and existing roles and responsibilities.
- Establish a well-defined and systematic approach to strategic decision-making about resources.
- Plan the strategic management of resources.
- Ensure sustainability.
- Identify new sources of income.
- Encourage a bidding culture.
- Find new ways to access funding streams.
- Sell your expertise, facilities and services.
- Establish financial control.
- Achieve value for money.
- Be accountable.
- Attract and retain staff with the potential to build capacity.
- Develop and use the strengths of staff members.
- Actively seek external advice and support.
- Establish partnerships.
- Involve staff.
- Support staff members.
- Establish trusting professional relationships.
- Welcome challenge.
- Be prepared to challenge.

Introduction

Over the last 12 months, during a period of global economic constraint, the effective and efficient use of resources in schools has become an increasingly high-profile issue. It is clear that in the future school budgets will be tighter and, when coupled with falling rolls, school leaders will be faced with some difficult budgetary decisions. For many headteachers, a period of limited growth or even budget reductions will be a relatively new experience. At the same time, it is reasonable that government and the public should expect schools to make the most effective and efficient use of the funding made available to them.

The National College is working with school leaders and national partners to promote the effective and efficient use of resources by raising awareness and understanding; changing culture to give greater value to cost-effectiveness; enhancing professional skills; and ensuring schools have access to appropriate tools and resources. The College is actively developing support for school leaders in this area.

As part of that support it has been working with six case-study schools to understand ways in which they have used their resources efficiently and effectively. All the schools have developed an approach that is tailored to their context and needs – there is no single blueprint for efficiency – but all have been driven by clear values that are focused on wanting the very best outcomes for children.

The case studies explore and document the effective use of resources within the following categories:

- procurement and technology
- resource use and financial management
- partnership and shared services

The key themes emerging from this research reflect its focus on what school leaders do in order to achieve resource efficiency. In particular, their success was due to:

- a strategic approach to decision-making about the deployment of resources
- the entrepreneurial cultures they actively promoted within the schools
- their commitment to identifying, developing and using knowledge and expertise both within and beyond their schools

Research methodology

Research brief

This research project was commissioned by the policy, research and development group of the National College for Leadership of Schools and Children's Services (the College). Its purpose was to provide insight into existing successful practice in the effective deployment of resources.

Key research questions were:

1. How have schools and school leaders identified opportunities to improve the effective deployment of resources? What leadership behaviours and practices in these schools facilitate this?
2. What tools or resources are currently available to and used by schools to address the effective deployment of resources?
3. What have been the challenges faced by schools in implementing changes to improve the effective deployment of resources? How have these been overcome?
4. What examples exist of the way in which partnership working supports the effective deployment of resources (to include partnerships between schools and partnerships with other agencies/organisations) and what are the leadership implications?
5. What is required by schools and local authorities in order to implement any change well?
6. How are any of the above affected by the nature of the environment in which the school operates? For example, what are the significant differences for rural schools, urban schools, those working across local authority boundaries etc?
7. How can each of the above areas be evidenced or measured?
8. What are the implications of all of this for school leaders and leadership?

Methodology

Six schools were involved in the research. Semi-structured face-to-face interviews, or in one case a telephone interview, were held with 18 senior leaders within the schools. These included five leaders at chief executive, principal or headteacher level, five business or finance managers, four leaders at director or deputy headteacher level, and four leaders at assistant headteacher level or equivalent. Most interviews were held with individuals, but in two cases a senior leader at headteacher or vice-principal level was interviewed together with the business or finance manager, and in another, five members of a senior leadership team provided a group interview. Interviews lasted between 45 minutes and 3 hours.

School contexts and backgrounds

The Blackpool Federation

Number on roll: 535 across 4 primary schools

The Blackpool Federation is made up of four primary schools in a largely rural area of Devon. The governing body of Blackpool Church of England Primary School developed a model for federation during the school year 2004/05, voting to pursue the possibility of federation that the executive headteacher describes as 'a principle that was right for education and for children'. The federation sought the support of the local authority for its proposals.

This first federation of schools in Devon began in September 2006 and involved Blackpool School and Chudleigh Church of England Primary School, which had been placed in special measures as the result of an Ofsted inspection in June of that year. By November 2006, all the key issues identified in the Ofsted inspection report had been resolved and by June 2007, Ofsted judged teaching and learning at Chudleigh School to be good with some outstanding features. The inspection report (June 2007) described the decision of governors to enter a federation as 'visionary'. In September 2009, the federation was joined by a further two schools at their request.

From the start, the strategic leadership of the federation has been the responsibility of a single governing body, together with the executive headteacher, formerly the headteacher of Blackpool

Church of England Primary School. The role of business manager has developed over time, and the holder of that post now contributes to strategic decision-making in a role that is described as a 'mirror image' of the educational lead role held by the executive headteacher. The executive headteacher and business manager play key operational roles in relation to finance and human resources.

Each school is run, on a day-to-day basis, by a head of teaching and learning. These heads hold primary responsibility for creating a stimulating learning environment and maintaining a focus on improving the quality of teaching and learning.

Refurbished accommodation has been available since September 2008 for the executive headteacher, business manager and governors. This has enabled the development of their strategic roles by separating them from the day-to-day running of the schools.

Governors believe that federation enables small schools, with teaching headships, to become more efficient, overcoming some of the disadvantages of duplication and helping to ensure better use of funding and expertise to meet the needs of pupils. The federation currently serves 535 pupils across 4 primary schools. The governing body is committed to its growth, believing that a total pupil roll of at least 800 is likely to achieve the best economies of scale.

Cotgrave Candleby Primary School

Number on roll: 555

Cotgrave Candleby Primary School opened in September 2006 and was formed as a result of the amalgamation of three local schools. In November 2007, it moved to new, spacious, purpose-built premises, described as 'fantastic' and 'aspirational'.

The school has over 500 pupils, most from White British backgrounds. The majority of pupils enter the school with attainments well below national expectations.

The school has been in beneficial financial circumstances, inheriting an underspend from each of the original three schools and receiving additional funding to support the process of amalgamation. Governors and senior leaders have taken the temporary nature of this affluence into account when making spending decisions.

Strategic decisions are made by the senior leadership team, which consists of the chair of governors, headteacher, director of strategy, three assistant directors, the business manager and the special educational needs co-ordinator.

The headteacher is a national leader of education.

There is a strong commitment to meeting the needs not only of pupils, but also of their families and community.

An Ofsted inspection conducted in January 2008 judged the school to be outstanding. It identified the following as contributory factors in achieving a 'high degree of quality and consistency in all aspects of the school's work':

- inspirational leadership provided by the headteacher
- commitment of staff
- shared vision
- rigorous management systems
- a higher than normal incidence of excellent teaching
- excellent curriculum 'packed with exciting first-hand experiences'
- thorough assessment procedures

Inspectors concluded that the excellent overall quality of the education, together with the 'increasingly important role' played by the school in village life meant that the school provided outstanding value for money.

Darlington Education Village

Number on roll: 1,369

Darlington Education Village opened in April 2006 as a federation of three schools located on a single campus – Springfield Primary School, Haughton Community School, an 11-16 comprehensive school, and Beaumont Hill School, a 2-19 community special school. The education village was funded by a private finance initiative (PFI) in partnership with Kajima Darlington Schools Limited. There are excellent facilities throughout the building.

The village has three specialisms – technology, arts and applied learning. In addition, it holds Leading Edge and Training School status. Beaumont Hill provides specialist provision for a full range of special needs, including profound and multiple difficulties, autism, severe learning difficulties, and behaviour, social and emotional difficulties. The education village is also home to the Steam Shed Theatre Company, part of the Chicken Shed Theatre Company, renowned for its inclusive approach to dance and performance.

The village's management has control over staffing, ICT, insurance, service level agreements, and curriculum resources, all of which are tendered for and tightly managed. The PFI partner has responsibility for facilities management and maintenance.

The leadership team consists of the principal and chief executive, supported by six vice principals, with responsibility for inclusion, teaching and learning, pupil engagement and wellbeing, community, and business strategy respectively, three assistant vice principals and six assistant headteachers.

Inclusion and the creation of opportunities for every pupil are at the heart of the village's ethos. Its work is based on a number of key principles relating to governance, leadership, curriculum, inclusion, resources and community, which enable decision-making on resource management to support its goals.

Outwood Academies Trust

Number on roll: 2,112

Outwood Grange Academy, formerly known as Outwood Grange School and then Outwood Grange College, has a mixed intake in excess of 2,000 pupils. In 2001, it had a £500,000 deficit budget. It achieved specialist technology college status in 2002 and since then has seen major redevelopment work to improve the college grounds, buildings and facilities. This has included renovation works, with new ICT suites, a recording studio and improved reception and sports facilities. In 2005 a new business and training centre opened, housing both the business department and additional training facilities for rental purposes. The college has used these advanced facilities to support other schools in the region, and to participate in the launch of national initiatives such as Make Your Mark: Start Talking Ideas, which encourages youngsters to engage with business.

In September 2009, Outwood Grange College opened as Outwood Grange Academy, with Michael Wilkins as the chief executive of the Outwood Academies Trust and the Outwood Grange family of schools. The intention of establishing the trust is to build on the outstanding practice and achievements of the recent past in order to provide a world-class

educational experience for students. There are currently five schools in the family of schools, each with its own vice principal, trained at the Outwood Academy. The schools are: Outwood Grange Academy, Outwood Academy, Doncaster, and three schools in Harrogate, Scarborough and Stockton-on-Tees that were previously in special measures or designated national challenge schools. The trust's ambition is to run 10 academies in the north of England.

Outwood Grange Academy has a budget of £13m. The schools within the trust have a total budget of £40m.

The Outwood Grange Academy is part of the National Leaders of Education and National Support Schools initiative. The knowledge and experience of the chief executive and staff members are used to provide additional leadership capacity to schools in challenging circumstances, including some in special measures or with a notice to improve as a result of Ofsted inspection, or some identified as being in steep decline. Schools in such circumstances make demands that must be met without compromising the quality of education offered at Outwood Grange Academy itself.

Sir William Burrough Primary School

Number on roll: 332

Sir William Burrough Primary School is located in Tower Hamlets in London and serves a diverse, multi-racial community. There are 332 pupils aged 3-11 years on roll, 85 per cent of whom come from minority ethnic backgrounds. Over 80 per cent of pupils have home languages other than English and about 20 per cent are in the early stages of learning English. A significant number of pupils come from disadvantaged backgrounds, with over 60 per cent entitled to free school meals. More than 20 per cent of pupils join or leave the school during the year. Fewer pupils than average have learning difficulties or disabilities.

The school specialises in providing a culturally diverse curriculum, has links with schools across the world and is a winner of the British Council's International School Award. It is dedicated to promoting high achievement and holds several

awards for music and the arts. It has strong, established links with local industry. The school's motto – 'We can do it' – reflects 'a stubborn belief that everything is possible,' says its headteacher.

The head adds that the leadership team is considered 'part of the resource base' of the school and consists of the headteacher, deputy head, three assistant heads and the school business manager. The headteacher and the school business manager have been in post for 13 and 9 years respectively and share a belief that financial decision-making should reflect the values of the school and the needs of the pupils. They share a perception that 'there is never enough money', but are committed to finding necessary funding.

The school offers external expertise to schools elsewhere in London through the City Challenge initiative, helping to generate greater capacity for bringing about change.

The Ferrers Specialist Arts College

Number on roll: 1,218

The Ferrers College opened in 1981 as a co-educational community school serving towns and villages in a mixed rural and urban community in East Northamptonshire. It has approximately 1,200 students on roll. It is now a foundation school and also holds trust status, owning its own land.

The college aims to create confident, articulate and creative students through its specialism in the performing arts, an aim reflected in its mission statement of 'aspire, achieve, acclaim'. It has won national awards in the arts, sports, careers, citizenship and health education.

The college works in partnership with four other schools, forming The East Northants Consortium (TENC), to provide 14-19 education, developing what the principal describes as 'an outstanding sixth form and an excellent record for gaining university places'. There are highly developed localised networks, regarded as a key resource, and international partners at a number of levels. The college has international school status.

A core set of aims underpins the work of the college. These are:

- We aim to provide a happy, well-ordered college community based on caring and supportive relationships, shared values and common aims.

- We aim to provide high-quality education that enables all to experience success and meets the needs of every student.
- We aim to prepare our students for life in a rapidly changing world, enabling them to contribute to their communities as caring, responsible and well-informed citizens.
- We aim to create an environment in which staff can learn and develop alongside the students.

TENC has brought a number of benefits to the school both in terms of revenue and capital funding. Agreements exist between the schools on transport, staffing and resources. Procurement contracts with the local authority are in place for the purchase of energy. All other financial decision-making falls to the leadership team in consultation with governors.

The senior leadership team is composed of the principal, two deputy headteachers, two assistant headteachers and four associate headteachers, each holding posts on a temporary basis which offer developmental opportunities to staff, and a school business manager. The leadership structure is designed to offer a blend of operational, strategic and developmental roles to each member of the team, allied with academic, pastoral and resource responsibilities that enable all to have a holistic view of the work of the school.

Definition of resource

Those in the case-study schools defined the term 'resource' in a variety of ways. One headteacher described it as:

"Everything we use to make children's lives better and to make the community better. It is more than just to do with finances. It is a spark, a passion that drives people."

Headteacher, Cotgrave Candleby Primary School.

This overarching definition can be broken down into components, each of which was recognised by leaders in the schools, although they may have been referred to in different ways. These components are:

- **intellectual capital:** the ideas and the energy that enable change and development, the talent-spotting, nurturing and training that develops the capacity of the organisation to secure sustainable, high-quality education for its pupils
- **physical capital:** the buildings, grounds, technology and facilities that provide a learning context for pupils
- **social capital:** the networks, partnerships and relationships, formal and informal, that provide practical and financial support for schools and their activities and encourage a culture of support, care and motivation
- **human resources:** the people - governors, staff and others - who provide strategic leadership and contribute actively to the life and work of the school and the provision made to meet the needs and interests of its pupils
- **revenue:** the basic budget share available to each school, together with additional income captured or generated through the school's entrepreneurial activities

Key themes

This report is structured around the following three areas:

- procurement and technology
- resource use and financial management
- partnership and shared services

These three categories were used as a means of analysis for this research, and the findings are reported below under these headings.

A number of key themes emerged from the analysis, all of which were common to the case-study schools. Each of the schools was characterised by:

- financial decision-making driven by **values**
- a **strategic approach** to decision-making about the deployment of resources
- an **entrepreneurial culture** and a 'can-do' attitude, which resulted in additional income
- **robust systems and structures**, acting as a framework for financial decision-making
- a commitment to identifying, developing and using **knowledge and expertise** in relation to managing budgets and a willingness and determination to seek out and draw upon available **social and intellectual capital**
- shared understanding and a **shared sense of responsibility** for the management and use of resources
- **openness to challenge** and a **willingness to challenge** established practices, systems and structures or the outcomes of decision-making elsewhere

Key themes – procurement and technology

The approach to procurement and technology in the case-study schools reflects their desire to achieve the best for their pupils with maximum economy. Business and finance managers tended to take the lead in watching out for and actively seeking opportunities to achieve savings and minimise expenditure. They had established systems to support their work, including access to local and national sources of information.

The Blackpool Federation used procurement systems to help identify local providers.

Achieving economies of scale, whilst at the same time ensuring the quality of the service, were the key drivers for the procurement activities undertaken by business managers and their teams. Several of the case-study schools are part of established partnerships specifically established to achieve economies of scale in purchasing and commissioning.

Darlington Education Village has procurement contracts with the local authority for computer consumables, office stationery and office furniture. It welcomes the local authority's commitment to developing a procurement strategy as part of the commissioning role, but has also developed creative approaches to school partnership led procurement.

Others had or were exploring opportunities to establish similar partnerships, agreements and contracts, including bulk buying and the outsourcing of services such as cleaning and catering.

The following examples illustrate the value of the schools' systematic, determined, entrepreneurial and often collaborative approach to procurement.

Darlington Education Village, through a tendering process, has a contract with Research Machines for the provision of ICT services for a period of four years. Drawing on this contract, technical and procurement support is provided for an additional 30 primary schools in the local area. This generates an income of £280,000 a year.

Sir William Burrough School undertook a three-year lease to equip a computer resources laboratory and, after discussion with staff, set up a 30-station base with computers and an interactive whiteboard. The staff and the school business manager are now exploring the introduction of visualisers¹ and tablet computers².

The Ferrers Specialist Arts College recently worked in partnership with four other schools to procure a £1.6m capital premises investment for each of the schools through an innovative joint bid to the Learning and Skills Council. The bid was co-ordinated by the headteachers and the college's director of 14–19 education, who worked together on a tender that produced one contractor for all five buildings. The result is a state-of-the-art vocational skills facility for the performing arts at Ferrers College, including recording studios, a radio station and extensive mixing facilities, and complementary facilities in each of the partner schools. The work was completed in 2010. It involved an extensive commitment of time from the senior leadership teams in each school and also, in the words of the 14–19 director, demanded 'a culture of partnership, sharing and supporting each other despite the tensions that can emerge' and 'a delicate ability to steer the local authority agenda for post-16 education'.

¹ A visualiser or document camera is a video camera designed to display documents and 3-D objects onto a plasma screen, television, projector or monitor.

² A 1Htablet computer is a small handheld device used for internet browsing, media consumption, gaming and light content creation.¹⁴

Key themes – resource use and financial management

The approaches taken within the case-study schools to resource use and financial management illustrate all the key themes that emerged from this research and reflect the strategic role of senior leaders in ensuring resource efficiencies.

Financial decision-making driven by values

Each of the case-study schools had a set of aims focused primarily on its pupils. As one senior leader said:

“The whole point of schools is that children come first and everything we do must reflect this single goal.”

Chief executive, Outwood Academies Trust

The aims in all the schools, however simply expressed, encompassed:

- the **environment**, which should be ‘safe, happy, caring and well-ordered’ and within which ‘every child can thrive’ (principal, Darlington Education Village)
- the **curriculum**, which should be ‘values led’ (principal, The Ferrers Specialist Arts College)
- **attainment and achievement**, which should be ‘at the highest level possible in all areas’, including the academic, social, emotional, physical, moral and ethical (principal, Darlington Education Village)
- the **community**, which should provide a range of activities for children and their families, with the intention of ‘drawing the community together’ and ‘promoting positive relationships’ between community members, resulting in benefits for all (headteacher, Cotgrave Candleby Primary School)

The strength of that commitment to children’s interests, the ‘desire to bring out the best in every child regardless of gender, race, colour [or] religious belief’ (principal, Darlington Education Village), was evident in the work of all the schools and whilst each wanted to make the best possible provision for its own students, activities extended beyond the boundaries of individual schools in the interests of children elsewhere.

Staff at Sir William Burrough School shared their expertise by providing external support for others without compromising the primary responsibility they held towards their own students.

Senior leaders within the academies do not promote the interests of their own schools if that is likely to ‘damage the interests’ of other children or schools in the local area (chief executive, Outwood Academies Trust).

The aspirations of senior leaders, in terms of making values-based provision for pupils, were high.

The Outwood Academies Trust was established with the intention of providing a first-class educational experience for its students across the north of England.

Darlington Education Village aims to become a centre of excellence, both locally and nationally.

The principal of The Ferrers Specialist Arts College expresses a belief in ‘comprehensive state education that raises the horizons for all and provides opportunities’.

In all cases, financial decision-making and decision-making about the deployment of resources were made with this evident and over-riding commitment to children’s interests in mind.

The values-led curriculum at The Ferrers Specialist Arts College is debated and decided by the leadership team in consultation with the governors, and is the major driver for financial resource allocation within the college.

At Sir William Burrough School, the headteacher and senior leaders ask, ‘Does the decision serve the values of the school? Is the decision enriching and enhancing the learning of the children?’ They look at any decision ‘through the eyes of the users’, irrespective of the nature and scale of the resource, whether it is to do ‘with pencils or the sports pitch’ (headteacher, Sir William Burrough School).

The values held by each of the case-study schools, and the vision that was an expression of those values, helped to govern the approach taken to decision-making, even when leaders were aware of financial constraints.

“It’s down to vision. If money drives you, you are struggling. If children are at the forefront of your thinking then you can facilitate effective learning regardless of obstacles... In the current climate, why should children suffer from the economic downturn? The vision can make you more savvy in budgeting, to make sure you’re not constrained by external factors that might make you think you can’t afford to do things.”

Headteacher, Cotgrave Candleby Primary School

A strategic approach to decision-making

Senior leaders in the case-study schools were not just visionary. Their determination to achieve the best possible outcomes for their pupils meant that they were also pragmatists. They perceived resource management as ‘a scaffold and a foundation for the achievement of vision’ (principal, The Ferrers Specialist Arts College), and had developed strategic approaches that encapsulated a belief that the school should provide a curriculum that ‘can be afforded and sustained over time, enabling creative thinking and development’ (chief executive, Outwood Academies Trust).

All the case-study schools had improvement plans, setting out long-term strategic goals. Although their approaches to school improvement planning varied, all were linked to budget plans or agreed long-term strategies for the management of resources, and all sought to be flexible enough to take advantage of unexpected opportunities that might help to meet identified needs and goals.

Two of the case studies, those for Darlington Education Village and the Outwood Academies Trust, illustrate a well-defined and systematic approach to strategic decision-making related to school improvement, based on clearly identified and expressed principles.

Darlington has identified six key principles on which the work of the school and decision-making about resource use is based. They are:

- governance: the existence of a single federated governing body for all three schools
- leadership: an integrated leadership structure, providing direction, vision and accountability, and contributing to the development of future leadership
- inclusion: an inclusive organisation, seeking to meet the needs of all
- curriculum: a single, all-through, personalised, accessible curriculum, planned in a cohesive way
- resources: excellent, shared resources, used to widen opportunities for pupils, parents and staff
- community: active engagement with the community and access to facilities and opportunities for the community

Outwood Grange Academy developed and implemented a seven-strand school improvement model across all the trust’s schools:

- 1 leadership with vision and efficacy
- 2 high-quality learning and teaching in the classroom
- 3 flexible curriculum model
- 4 systematic monitoring and intervention
- 5 systems, protocols and learning environments
- 6 bespoke professional development
- 7 a praise and reward achievement culture for staff and students

The fifth strand (systems, protocols and learning environments) introduces the concept of curriculum-led financial planning, with the intention of bringing a school’s budget under control and creating a surplus year on year.

It is based on a contact ratio of 0.79, which ensures that a balance is achieved between the provision of a broad and balanced curriculum and reasonable class sizes. Using this ratio, class sizes average 27.

It is also based on a belief that the school should provide a curriculum that is affordable and sustainable over time, and that, if the curriculum is not controlled, decisions might easily be made that increase expenditure, creating difficulties in the future. It accepts that the biggest cost in any school is that of staff, which affects the nature of the curriculum that can be adopted and implemented.

This financial strategy is underpinned by four distinct principles:

- 1 minimising expenditure
- 2 income capture
- 3 income generation
- 4 capitalising on collaboration

In one of the case studies, financial decision-making reflected a particular philosophical approach to school improvement.

Sir William Burrough School has the usual school improvement plan, but prefers to adopt a Kaizen³ approach, a philosophy or practices that focus upon the continuous improvement of processes. The headteacher is constantly thinking about how the school can be improved. There are many occasions when staff members consider together the question, 'How can we make things better?' This practice is not just about making existing things better; rather, it invites every member of staff to talk about a transformational agenda.

The lead professional in each school, whatever their title, executive headteacher (Blackpool), principal (Darlington, The Ferrers Specialist Arts College), chief executive (Outwood), or headteacher (Cotgrave Candleby, Sir William Burrough), played a key strategic role in school improvement and financial management. However, they shared this role with others, including business or finance managers, vice principals, governors and other

senior leaders. It was clear that, in at least two cases, the strategic role of the business or finance manager had been either purposefully developed, as in the case of the vice principal business strategy post at Darlington Education Village, or had developed over time because of the way the postholder had fulfilled the responsibilities of the post, as in the case of the Blackpool Federation.

The close involvement of key strategic leaders in school improvement processes, resource management and monitoring helped to ensure financial control.

However, the involvement of others was invaluable too, enabling decisions that would help to ensure the best possible provision for pupils.

Within the senior leadership team of Darlington Education Village, there was a 'genuine commitment to identifying and prioritising any under-spend... and a definite value commitment to careful financial planning' (vice principal business strategy).

At The Ferrers Specialist Arts College, decisions on staffing were taken at three levels: the operational level, senior leadership team level and at governing body level. These three perspectives have generated a balanced staff base with, the headteacher says, 'excellent retention features'. It reflects the value placed on staff as a resource and has resulted in, for example, an 'overstaffing' approach, the £90,000 costs of which have been fully met by savings of £25,000 in the supply budget, savings from employing staff to cover maternity leave of £50,000 and savings in the costs of replacement teachers to cover long-term sick leave of £15,000. It is an approach that ensures cover is provided by teachers who not only have the necessary subject expertise, but also relevant and useful knowledge of the school's processes and practices.

³ 'Kaizen' is a Japanese expression meaning the achievement of higher standards by making incremental and continuous improvements to processes and systems and involving everyone in an organisation from the chief executive to the lowest-paid worker. The concept is used widely in manufacturing and engineering, and to support business processes and management. It has also been applied in healthcare, government, banking, and many other industries.

In all their strategic activities, senior leaders were committed to the development of strategic leadership skills in others as a way of ensuring the best outcomes for pupils.

At The Ferrers Specialist Arts College, senior leaders were offered a blend of operational, strategic and developmental roles, alongside academic, pastoral and resource responsibilities, which provided them with a holistic view of the school.

Within the Outwood Academy, vice principals and other senior leaders were trained in the school's improvement model, so that they were prepared for leadership responsibility in schools taken over by the trust.

For the same reason, making staff appointments was an important part of the schools' strategy in relation to resource management, one that was not taken lightly.

Joint staff appointments made to the three schools within the Darlington Education Village were never made on the basis of replacing a post with like for like. Instead, a period of review is a standard part of the process to discover whether the need for a new member of staff might present an opportunity to create a new post more relevant to future needs.

All new appointments to schools in the Blackpool Federation are made on federation contracts to ensure maximum flexibility in the deployment of staff. Indeed, several members of staff on existing contracts have opted for new federation contracts because of the opportunities these provide to gain experience across federation schools.

In all cases, leaders were careful, when setting budgets, not to anticipate funding that was not already secure. At the same time, they frequently made decisions that had long-term savings in mind, although costs in the short term might be greater, and they invested in advance of need.

Demographics were the only factor identified by the chief executive of the Outwood Academies Trust considered to be outside the control of school leaders, with the possibility that falling rolls could undermine a school's strategic approach to resource management. Otherwise, schools with a clear strategic approach to curriculum provision and the management of resources, and with robust systems and structures in place, were in a strong position to ensure the provision of sustainable, high-quality education for pupils.

An entrepreneurial culture

The case-study schools were, without exception, entrepreneurial in their approach to resource management. They actively sought savings, accessed additional funding wherever possible, sold services and exemplified a culture within which risk-taking was encouraged, endorsed and supported as a means of achieving desired outcomes.

Savings were made in a variety of ways, including economies of scale achieved through business partnerships formed with other schools or the use of bulk-buying opportunities through local authorities.

Schools actively sought additional funding, referred to by the chief executive of the Outwood Academies Trust as 'income capture', through grants and funding streams associated with local and national initiatives and businesses.

The Cotgrave Futures Group is a charitable trust that taps into pockets of money from a variety of sources to support the work of the school.

Charitable status enables Sir William Burrough School to access extra funding from commercial donors such as Unilever and the McFell Trust. Discretionary income such as this can act as capital or revenue funding, and contributes towards much of the transformational work that takes place within the school, such as the development of playground areas, funded by a National Lottery grant of £80,000 or the cost of an artist in residence, covered by £70,000 raised by a local production company through an event of which the school was the sole beneficiary.

Successful bids for funding at The Ferrers Specialist Arts College included:

- £5,000 for an orchard
- £22,000 for the British Council's Comenius programme⁴
- £40,000 for disabled access
- £129,000 for specialist schools status
- £1.6m for a vocational skills centre

Schools effectively sold three things in order to generate income – their expertise, their facilities and their services.

Involvement in initiatives such as National Support Schools, National Challenge, City Challenge, National Leaders of Education or a community cohesion project created opportunities to generate income by providing support to other schools.

External services provided by Cotgrave Candleby Primary School generated £19,000 in 2008/09 and a projected £26,000 in 2009/10.

⁴ The Comenius programme focuses on the first phase of education, from pre-school and primary to secondary schools. It is relevant for all members of the education community: pupils, teachers, local authorities and parents' associations. Part of the Lifelong Learning Programme, Comenius seeks to develop knowledge and understanding among young people and educational staff of the diversity of European cultures, languages and values. It helps young people acquire the basic life skills and competences necessary for their personal development, for future employment and for active citizenship. www.britishcouncil.org/comenius.htm

The use by other schools and community groups of facilities such as minibuses or all-weather sports fields at Cotgrave Candleby Primary School, the Outwood Academies Trust and at Sir William Burrough School all generated some funding, although often charges were low because of the schools' commitment to meeting the needs of children, whether they were their own pupils or not. However, the business and training facilities developed at Outwood Grange Academy were not only used to provide courses to support schools across the north of England, but also deployed as training facilities for commercial rent.

Schools provided a variety of other services for which they received remuneration and, very often, the sale of services was linked with the curriculum and teaching and learning, contributing towards the learning of both pupils and professionals.

Darlington Education Village offered ICT support to local primary schools, generating £280,000 annually.

The Ferrers Specialist Arts College receives £50,000 a year to provide training to other schools and £20,000 for its contribution to initial teacher training.

Candleby Enterprises has developed and sells DVDs on phonics and modern foreign languages, and has plans to establish a market stall and, perhaps, in the future, a local shop.

Darlington Education Village has its own bistro designed to provide students with the opportunity for sheltered work experience.

In several of the case-study schools, a bidding culture had developed.

The business manager described The Ferrers Specialist Arts College as 'responsive to a bid culture, practised in writing submissions and... well connected'.

However, the chief executive of the Outwood Academies Trust emphasised the need to seek and appropriate funds only if these would contribute towards priorities already identified for development.

Robust systems and structures

Underpinning the strategic and entrepreneurial approaches towards resource management were robust systems and structures, which, though well-established for the most part, were nevertheless under constant review to ensure their effectiveness. These systems and structures encompassed leadership structures, roles and responsibilities, and financial processes.

In all cases, whatever their titles and structures, leadership teams controlled all aspects of the management of resources and premises, both strategically and operationally. They were supported by committee structures, including those responsible for personnel and finances. These involved governors, staff and, in at least some cases, pupils, either separately or together in consultative and decision-making processes. Strong leadership teams enabled entrepreneurial activities by ensuring that any work undertaken beyond the school, such as consultancy offered by the headteachers and business managers, or external services offered by other staff members, did not threaten the quality of provision made for a school's own pupils.

The chair of governors for the Blackpool Federation works hard to ensure that governors play a significant role in strategic decision-making. The Ofsted inspection report (2009) noted that the governing body has provided a clear framework enabling leaders and teachers to 'work effectively within a shared philosophy'.

The decisions of the Outwood Academies Trust Board are informed by advisory governing bodies at each of the academies.

The executive headteacher of the Blackpool Federation plays a key strategic role in the development of the federation, but the role of the business manager has developed over time to become a mirror image of the education lead role. Both act operationally as well as strategically. Between them, they take responsibility for personnel and finance issues across the federation. This depersonalises the handling of personnel issues and ensures financial control. The business manager leads a federation administrative team, with two members in each school taking responsibility for front-of-house services and either personnel and budget issues or resource and building issues. Their work helps to 'take the pressure off' the heads of teaching and learning and plays a part in seeking value-for-money opportunities. This approach enables the heads of teaching and learning in each of the schools 'to drive forward, to improve quality for children without worrying about other things' (executive headteacher, Blackpool Federation).

Commitment to identifying, developing and using knowledge and expertise

In identifying, developing and using the knowledge and expertise of others, both within and beyond the schools, senior leaders were characterised by a willingness and determination to seek out and draw upon available social and intellectual capital.

Much of the knowledge and expertise available came from within the schools. Senior leaders recognised this and were attentive to developing and using the strengths of staff members, not least because the cost of staffing was the greatest financial commitment made. The selection, deployment and retention of staff were thus critical factors in the success of the schools because staff members were the main, though not only, source of what one headteacher referred to as 'intellectual capital'.

Within the Blackpool Federation, intellectual capital was considered the most important resource available, underpinning everything else. From this resource came the ideas and energy that have enabled the federation to develop. The headteacher considers that, in securing sustainable, high-quality education in a context of increasing financial constraint, 'intellectual capacity wins the day and costs nothing':

"It's about getting the best out of people, knowing where their strengths and weaknesses are, unlocking their potential and matching the person to the responsibility."

Director of strategy, Cotgrave Candleby Primary School

In their selection processes, the case-study schools benefited from the interest of potential staff in their innovative approaches. This frequently generated a greater and more expert field of candidates than was typical, leading to more choice for selection panels, as the following example suggests.

The Blackpool Federation attracts a larger than usual number of applications for teaching and support posts because it provides opportunities for staff to gain:

- a wider experience than would otherwise be the case within small rural schools in this area of Devon
- promotion within and across the federation schools

In addition, the unique and cutting-edge nature of the federation attracts applications from self-selecting, high-quality teachers, as well as newly qualified teachers, providing 'a greater choice' for governors and senior leaders (executive headteacher).

The administrative roles in each of the schools also attract applicants because the usual pressures on administrative staff are relieved by the role of business manager. Within the federation, the business managers says, 'we are offering a do-able job at an attractive rate with a safety net of support'.

The senior leadership posts for heads of teaching and learning also prove attractive to potential candidates because they are designed to enable those filling them to focus on improvements in teaching and learning by relieving them of some of the responsibilities usually associated with headship, such as financial management.

In seeking to ensure the availability of intellectual capital, senior leaders within the schools saw themselves as having responsibility for the continuing professional development of staff members, and then for the use of that developing intellectual capacity across and beyond the schools.

Senior leaders within the Blackpool Federation see themselves as responsible for 'identifying the next round of leaders... developing people who don't think they are leaders, talent-spotting, nurturing, training', and then 'using that capacity across the federation to benefit the children' (executive headteacher).

Each of the case-study schools was also engaged in sharing its knowledge and expertise with others. The benefits of doing so were not only felt in terms of income generation, but also in a continuous cycle of developing knowledge and expertise, as the following examples suggest.

The Blackpool Federation is involved in the National College's Succession Planning project, developing practice both within and beyond the federation.

The Blackpool Federation provides action research opportunities for students at the local university; this also provides access to academic realms for staff and pupils.

The vice principal business strategy at Darlington Education Village acts as a consultant to other schools, but also brings back the experience gained to the village. This has contributed to the development of the role.

Senior leaders were not dependent solely upon their own knowledge or that of others within the schools, however. They actively sought advice and support on financial issues from beyond the schools.

The chair of governors at Blackpool Church of England Primary School came from a banking background. He helped to develop the vision for a federation of schools with the headteacher and is also active in ensuring that the governors play a significant role in strategic decision-making.

The chair of governors at Cotgrave Candleby Primary School is also the head of finance in the local authority. He brings relevant knowledge to governing body discussions.

Additional governors on the governing body of The Ferrers Specialist Arts College include representatives from the Royal Society for the Protection of Birds, the Duchy of Lancaster and the University of Leicester. They provide new perspectives on the use of resources. The expertise of one of the governors enabled a thorough analysis of the budget position in partnership with the school business manager.

Darlington Education Village sought advice from value-for-money consultants, because benchmarking information currently available does not offer comparisons with PFI schools or federations.

Senior leaders at Cotgrave Candleby Primary School take full advantage of advice offered by the local authority on budget-setting and on issues to do with the school's provision of external services, including consultancy, advice and support, and training.

Senior leaders at Sir William Burrough School take advantage of advice and support from the local authority, which encourages, for example, the use of benchmarking sites or emphasises the importance of seeking best value.

Shared understanding and a shared sense of responsibility

People were the most highly valued resource within the case-study schools:

"It is people who make the ethos, and what happens within the building and the values held by people and the atmosphere that make it work."

Headteacher, Cotgrave Candleby Primary School

That ethos was characterised, in all the case-study schools, by a commitment to collaborative working underpinned by shared understanding and a shared sense of responsibility for the work of the school and the outcomes achieved by pupils. This was achieved in a number of ways.

Firstly, senior leaders sought to involve as many stakeholders as possible in identifying and planning to address needed improvements in provision and outcomes.

At Sir William Burrough School, the headteacher invites all members of staff to talk about a transformational agenda, not just how to make existing things better. Change is supported through discussions with stakeholders and these include governors, parents and pupils.

Secondly, senior leaders involved as many stakeholders as possible in financial decision-making to support school improvement.

Within Darlington Education Village an impact evaluation meeting is held at the end of each year, when each budget holder reviews the year, identifies future needs and plans for the use of funding available to them during the following year.

At Sir William Burrough School, discussions with staff inform budget decisions based on identified priorities, so that if, for example, a big push is needed on maths, then maths provision will get the lion's share of the allocation. Pupils are involved through the school council. The school business manager believes that everybody has a voice in budget setting:

"Decision-making on the budget goes from the top to the bottom. Children were recently involved in a resource decision on swings!"

School business manager, Sir William Burrough School

The extent to which this was done and the ways in which it was done varied from school to school.

Thirdly, senior leaders encouraged staff to consider value-for-money issues when fulfilling their own responsibilities in relation to financial management.

Within the Blackpool Federation, heads of teaching and learning were responsible for the curriculum, the professional development of staff, the employment of supply staff and the purchase of consumables. If they wanted to spend more in one area, then they had to make savings in another.

At Cotgrave Candleby Primary School, all staff are encouraged to be leaders. They are encouraged to think in terms of value for money by linking the costs of developments for which they are responsible with the school improvement plan. Subject leaders are expected to 'know where the subject is going and what they need for the journey'. They are not given a delegated budget, but have to make the case for the funding they believe they need, to plan the spending and to 'make money work' for them (business manager).

An incentive scheme was introduced to the Darlington Education Village, allowing 50 per cent of any underspend to be carried forward and used for development purposes in the following year.

At Sir William Burrough School, each of the teachers has a budget and is expected to plan expenditure.

Fourthly, staff members were kept well-informed about financial issues. In most of the schools, this was through established systems, such as meetings between the business manager and budget holders or meetings of financial committees. Their understandings were developed by practical involvement in budget-setting and financial decision-making processes. Within the Outwood Academies Trust, however, specific training on financial issues was provided for leadership teams.

Senior and middle leaders within the Outwood Academies Trust are clear about the meaning of the term 'resources', having been through a 10-week modular training course on school improvement provided by the Outwood Grange Academy. The fifth module of this course, on systems and protocols, addresses curriculum-led financial management. This means that all those in leadership positions across the trust are fully aware of the agreed approach to financial decision-making and the thinking behind it. This places them in a better position to plan developments within their areas of responsibility and to argue the case for funding to support those developments without compromising other work within the school. The training in the trust's school improvement model is an important component in ensuring common understanding and facilitating collaborative working practices.

"Our [school improvement] model allows us to build leadership capacity and give senior leaders the chance to get used to working together before putting them into a high-pressure situation at a school where we need to raise performance in a very short space of time."

Michael Wilkins, chief executive, Outwood Academies

Finally, staff members were well-supported in fulfilling their responsibilities with respect to resource management and financial management.

Within the Blackpool Federation, the executive headteacher acted as a coach and mentor for heads of teaching and learning. His role in relation to personnel issues, and the role of the business manager in relation to financial issues, helped to take the pressure off the heads of teaching and learning and engendered collaborative working practice across the federation as a whole.

At Cotgrave Candleby Primary School, the director of strategy has 'ownership of the direction of the school', with the 'safety blanket' of working with the headteacher.

The monitoring of spending contributed to this support.

The chief executive of the Outwood Academies Trust meets on a three-weekly cycle with vice principals to ensure that the agreed contact ratio of 0.79 is maintained.

Governors for the schools within Darlington Education Village were actively involved in monitoring to ensure that the use of resources represented an investment in improving standards.

At a staff level, the governors agreed to move from a centralised approach to resource management, to a more devolved model and increase the number of people within the school taking responsibility for financial decision-making and for achieving resource efficiencies.

Within the Blackpool Federation, the shared commitment to the vision for the federation and for the values that influenced its activities led to a mutual confidence between leaders, evidenced in a distributed leadership model. This enabled leaders to feel a sense of ownership in decision-making processes, including those that had to do with financial management.

The vice principal business strategy at Darlington Education Village considers that trust and clear accountability is a major factor underpinning the effective implementation of pooled budget arrangements across the three schools. Four members of the village support team have completed the Certificate of School Business Management (CSBM). They have a common understanding of the village's processes, can cover for one another and offer consistent messages:

"They are highly valued across the organisation. If someone doesn't know or understand something, they come to the village support team for advice. There are absolutely no issues of status or difference between teachers and support staff."

Vice principal business strategy, Darlington Education Village

Initially senior leaders held responsibility for the development of the budget and the identification of priorities for spending within the Darlington Education Village. However, as the work of the village has become more established and relationships between staff in the different schools more trusting, these responsibilities have been progressively devolved throughout the schools, with budget managers responsible for their own budgets, spending decisions linked to costed action plans and monthly meetings with the finance manager to review progress. This has led to a common commitment not to spend unless it is necessary, and to ensure that resources bring about evidence of improvement.

The importance of trusting professional relationships is explicitly recognised within two of the schools and implicitly in all.

The headteacher at Sir William Burrough believes she should never leave any conversation with anybody without it having being characterised by 'hope and trust'. She believes these are necessary to achieving a collaborative approach and a shared sense of responsibility for the work of the school.

The principal at The Ferrers Specialist Arts College believes that 'camaraderie and a big team spirit' leads to a 'goodwill account'. She was careful not to 'overspend' this goodwill account because it was one of the most effective resources available within the school.

The value and importance of collaborative working practices in the schools was recognised by Ofsted:

"A clear framework enables all the leaders and teachers to work effectively within a shared philosophy. They are carefully interpreting the recently drafted and well-structured federation improvement plan to ensure it fits, more precisely, the needs of this school."

Blackpool Church of England Primary School,
Ofsted inspection report, March 2009

"A major strength of the school is that everybody is pulling in the same direction."

Cotgrave Candleby Primary School, Ofsted
inspection report, January 2008

Openness to challenge

Senior leaders within the case-study schools welcomed challenge that enabled them to improve practice. For three of the schools (Cotgrave Candleby Primary, Sir William Burrough and The Ferrers Specialist Arts College), the introduction of the Financial Management Standard in Schools (FMSiS) in January 2007 was welcomed as a means of carrying out an internal audit of financial practices and achieving clarity about both the actions to be maintained and areas for improvement.

Senior leaders at The Ferrers Specialist Arts College found that FMSiS provided a good checklist, which, used alongside benchmarking information available from the local authority, helped them to ensure that the school's systems dovetailed with its approach to provision and improvement and enabled them to be, in the words of the principal, 'prudent'. They welcome continual challenge from external bodies such as Ofsted to ensure value for money and particularly value an annual audit conducted by the local authority that checks the school has followed best-value principles.

Senior leaders were also willing to challenge budget allocations from their local authorities and the costs of support. In doing so, they drew on the knowledge and expertise of business managers and finance advisers.

The executive headteacher and business manager of the Blackpool Federation, with the support of the governing body, made a successful case for reducing the payment to the local authority for the provision of support for human resources. They argued that it was unfair to make a charge for services that related to the number of schools within the federation rather than the number of pupils, and compared the demands made on the local authority service and the relative costs with those of a secondary school serving the same number of pupils. The executive headteachers says that the size of the federation puts it on a 'level playing field' with secondary schools and gives it 'more clout'. Governors and senior leaders feel more able, as a result, 'to demand and get more money'.

Close monitoring of the budget disclosed that the Darlington Education Village was entitled to more funding than it had received. A challenge to the local authority resulted in an increase to revenue funding of £275,000 a year.

Key themes – partnership and shared services

The case-study schools had established a variety of partnerships, formal and informal, with a range of different kinds of organisations. The nature of these partnerships illustrates several of the key themes that emerged from this research.

Financial decision-making driven by values

Senior leaders within the case-study schools were ethically committed to meeting the interests and needs of children, whether they attended their own schools or elsewhere. For that reason they actively sought opportunities to work with other schools and to share their facilities and expertise.

The building and facilities of Cotgrave Candleby Primary School are used as a common resource for the community, open until 9pm every day and providing a range of activities for children and their families. The school works closely with other local schools at a practical level, sharing expertise, inviting pupils to take advantage of externally provided activities and sharing the use of minibuses.

The knowledge and experience of the chief executive and staff members of the Outwood Grange Academy provide additional leadership capacity to schools in challenging circumstances, including some in special measures or with a notice to improve as a result of an Ofsted inspection, and some identified by Ofsted as being in steep decline.

In fulfilling this moral purpose, senior leaders were averse to the idea of competition that might put the interest of children who were not their pupils at risk.

The Outwood Academies Trust's moral purpose is that children's interests should come first, meaning that academies within the trust will not act in ways that are detrimental to the interests of young people or schools within the vicinity of one of the academies. They will not, for example, market an academy aggressively to maintain or build a school roll or to seek to overcome the disadvantages of a falling roll.

In their dealings with other schools and groups, consideration was given to the wider moral purpose of the partnership when making decisions about charges, even where partnerships offered opportunities for income generation.

Staff from Sir William Burrough School offer support to schools involved in City Challenge, providing external expertise to help generate capacity for change. They are 'professionally generous' in doing so, says the headteacher.

Close links with community groups and a commitment to community use of the school's facilities at Cotgrave Candleby Primary School has generated income, although the primary motive is to provide activities for children, adults and families and to create a feelgood factor within the community as a whole. Prices for activities are kept competitive because the community is not an affluent one, and many of the organisations using the site, such as the Little Kites Kids Club, are self-financing.

An entrepreneurial culture

Senior leaders in the case-study schools actively sought new opportunities for partnerships that offered benefits for pupils. They were also alert to additional opportunities for income capture and generation arising from existing partnerships.

Links with local businesses have contributed to developments in playground provision for pupils at one of the schools within the Blackpool Federation.

Cotgrave Candleby Primary School has established a number of beneficial partnerships with local businesses. Barton Buses offers free bus travel for parents and children to get into the town in return for the school advertising the buses in its literature. Severn Trent Water provides water bottles for the children as a means of raising the profile of the business within the local community. Blockbuster and UBC Cinema provide children and families with free access to films in the local surround-sound cinema. As well as providing a community service, this generates funds for the school.

Robust systems and structures

There are several formal partnerships between the schools and other organisations which operated on the basis of well-established systems and structures, with a specific focus on resource use and financial management.

Darlington Education Village was funded as part of a PFI project and for the first 25 years of its existence the building is owned and managed by Kajima Darlington Schools Limited, after which it transfers to Darlington Borough Council. The village management has control over staffing, ICT, insurance, service level agreements and curriculum resources. The PFI partner has responsibility for building management and maintenance, with the village's budget top-sliced to meet those costs.

The Ferrers Specialist Arts College is locked into a number of agreements on transport, staffing and resources linked to the 14-19 arrangements between five schools in The East Northants Consortium (TENC). The school has benefited financially from the economies of scale that belonging to this group has brought. The five schools are dedicated to collaborative working at a deep level and recently supported an innovative bid to the Learning and Skills Council for approximately £1.6m for each school to develop five complementary centres for vocational skills.

Formal partnerships such as these can prove limiting, as well as advantageous. The PFI partnership with Darlington Education Village, for example, provided stability and certainty around the schools' spending on the building, but limited opportunities to explore possible savings with respect to building maintenance. However, the financial advantages of partnerships usually outweighed disadvantages. They also developed over time.

Working from one budget for the whole of Darlington Education Village rather than separate budgets for the three schools has been a major advantage:

"It meant that we could align the budget to the priorities of the federation as well as to individual schools... we could also avoid duplication."

Vice principal business strategy, Darlington Education Village

Pooling and managing the budget in this way was not without its difficulties, but the vice principal believed the school management had learned the importance of focusing on 'what will be gained rather than what might be lost'.

In addition to formal partnerships associated with resource and financial management, informal and formal partnerships existed between the schools and parents, community groups and local businesses. All provided an additional resource and were co-ordinated from within the school.

An over-60s group visits Cotgrave Candleby Primary School regularly to teach pupils to knit.

Darlington Education Village has close relationships with the local community, co-ordinated by the vice principal community. There is a community awards scheme linked with the local residents group, and a very active parents' forum, which holds fundraising and parent activity days on the village green. Parents also regularly volunteer to support the school. The village has links with local business and industry, whose employees offer mentoring support to students.

A blue chip company with a local head office provides time and resources to support reading developments among pupils at Sir William Burrough School.

Commitment to identifying and using knowledge and expertise

Senior leaders in the case-study schools actively sought and took advantage of partnerships that provided them with advice and support on financial issues.

The local authority offers a range of support for schools in relation to budget setting, external services, consultancy, advice and training. Cotgrave Candleby Primary School takes full advantage of these to explore opportunities for making savings or accessing additional funding from, for example, available grants.

Sir William Burrough School uses a financial consultant who works within the local cluster of schools. He provides advice for the school business manager, enabling her to be more strategic in her role.

Their willingness and determination to seek out and draw upon available social and intellectual capital led the case-study schools to access support from a variety of sources:

- parents
- ex-pupils
- community members
- local businesses
- other schools, colleges and universities
- international partners
- networks, including local schools, area clusters and local authority structures

Importantly, some found that the innovative nature of their work excited interest among potential partners and made beneficial partnerships more likely.

The executive headteacher of the Blackpool Federation has said that its innovative nature ‘opens doors’ and ‘promotes partnerships’, giving access to funds that not always available to a single, small, rural school.

The role of the school business manager

In the case-study schools, the business manager role sits within the senior leadership team (SLT), alongside and equal to other members of that team. She/he has responsibility for supporting the headteacher and governing body in planning, preparing, monitoring and reviewing the budget and for informing the SLT, on an ongoing basis, of any emerging issues. This enables them to take action to ensure that the provision made by the school is delivered within budget.

As a member of the SLT, the school business manager plays a strategic role in decision-making about all aspects of the school. At the same time, the headteacher and other senior leaders and managers share the responsibility for ensuring that budgetary issues are addressed. All decision-making takes place within a strategic framework that relates to the provision a school is making for its pupils, within which leaders are intent on ensuring that value for money and resource efficiency are achieved.

This has the advantage of:

- strengthening the business manager's understanding of the needs of the service by involving him/her in strategic decision-making about provision; she or he is perceived by other senior leaders and managers as sharing their concerns about meeting the needs of pupils
- improving the understanding of all senior leaders and managers about budgetary issues and the part that the budget can play in helping them to meet pupils' needs
- ensuring a shared sense of responsibility among senior leaders and managers for provision and for resource efficiency and value for money
- achieving a better and shared understanding among senior leaders and managers about priorities for provision and the ways in which effective resource management can contribute to more efficient school improvement processes and outcomes for pupils
- improving professional development and career opportunities for all

- avoiding the tensions sometimes apparent in a more traditional model of a business manager's role, when governors, headteachers and business managers may be perceived by others as focusing on achieving savings to the detriment of meeting needs and where others may be perceived as focusing on need, without recognising budgetary constraints and without exercising budgetary responsibility

In particular, the school business manager plays a significant part, illustrated throughout this report, in ensuring that a sustainable core offer is provided for the pupils and that decisions about spending are informed, even driven by, curriculum imperatives and the impact these have on a school's staffing structure and complement. At the same time, she or he actively seeks to increase the disposable income available to the school by achieving savings, accessing additional funding streams and identifying opportunities to generate additional income. This enables the school to invest in initiatives that contribute towards successful outcomes for its pupils and benefits for others within the school and the community.

Top tips: impact and strategies for change

In all the case-study schools, catalysts for change and for developing greater resource efficiencies had involved people, events, circumstances and opportunities unique to them, prompting new approaches. Each school had adopted different ways of working, which were context specific and tailored to their particular needs.

In each case, however, senior leaders believed that their approach to the management of resources had significant benefits for pupils, staff and the communities that the schools served, enabling them to meet the needs of children, their families and the communities within which they lived more effectively.

For pupils in particular, leaders cited improvements to the learning context, the provision of sustainable, high-quality education and improvements in outcomes, including levels of achievement. They also claimed benefits in the recruitment and retention of staff, their professional development, leadership effectiveness, initiative and innovation, and financial surplus. In addition, senior leaders believed that the commitment evident within several of the schools to the provision of extended services for children, their families and community members led to increasingly positive relationships within their local communities. Some of these benefits can be directly attributed to schools' systematic approaches to resource management. However, clearly, a number of other factors were operating as well, and direct cause and effect is not always easy to establish.

Nevertheless, the case studies provide many rich examples of what school leaders did to achieve greater resource efficiency and the outcomes of their actions. Out of their experience, leaders in the case-study schools offered tips for bringing about greater resource efficiencies. These all reflect the key themes identified within this report and are summarised against those themes below. They are by no means exhaustive, however. Nor are they necessarily exclusive to a single heading. So far as is possible they are practical in nature and are illustrated from the case studies in ways that show a quantifiable impact within a particular context. Not all the tips will be appropriate to all circumstances, and nor will they necessarily have the same effect in all circumstances. However, they provide a bank of ideas from which senior leaders can draw or which may prompt new ideas suited to their own contexts.

Financial decision-making driven by values

Top tip: Establish the values and vision and then identify how the available budget will be used.

At Sir William Burrough School, the headteacher and senior leaders ask, 'Does the decision serve the values of the school? Is the decision enriching and enhancing the learning of the children?' They look at any decision through the eyes of the users, irrespective of the nature and scale of the resource, whether it is to do 'with pencils or the sports pitch' (headteacher, Sir William Burrough School).

The headteacher of Cotgrave Candleby Primary School comments:

"It's down to vision. If money drives you, you are struggling. If children are at the forefront of your thinking then you can facilitate effective learning regardless of obstacles... The vision can make you more savvy in budgeting, to make sure you're not constrained by external factors that might make you think you can't afford to do things."

A strategic approach to decision-making about the deployment of resources

Top tip: Develop new and existing roles and responsibilities.

A new post of income generator has been created and filled at Cotgrave Candleby Primary School as part of a school improvement priority on income generation. The postholder's brief is to find enough funds to cover the cost of the new role and to support innovation within the school and the community. Senior leaders are hopeful that this will complement and support the successful work of the school business manager in raising additional funds for the school's activities.

The role of the executive headteacher for the Blackpool Federation was clearly defined by governors when the model for the federation was first developed. From the beginning he has played a key strategic role. The role of the business manager, however, has developed over time, becoming increasingly strategic in nature as the federation has matured. Both now act strategically as well as operationally and the two roles complement and support one another, the role of business manager being described by the executive headteacher as the 'mirror image' of the education lead role. Between them, they take responsibility for personnel and finance issues across the federation. This depersonalises the handling of personnel issues and ensures financial control. The executive head comments that this also enables the heads of teaching and learning in each of the schools 'to drive forward, to improve quality for children without worrying about other things. It saves frustration.'

The business manager at Cotgrave Candleby Primary School is described by her colleagues on the SLT as having both business acumen and a good grasp of educational philosophy. This enables her to make judgements about value for money based on the needs of children; her contribution to strategic decision-making is highly valued as a result. At the same time, her colleagues have become increasingly able to share with her responsibility for financial decision-making and resource efficiency. They know how to make the best use of resources to meet the identified needs of pupils and fulfil their vision for the school.

Top tip: Establish a well-defined and systematic approach to strategic decision-making about resources.

Outwood Grange Academy developed and implemented a school improvement model in all the trust schools. The fifth strand of this model, systems protocols and learning environments, introduces the concept of curriculum-led financial planning, with the intention of bringing a school's budget under control and creating a surplus year on year. It is based on a belief that the school should provide a curriculum that is affordable and sustainable over time, and that, if the curriculum is not controlled, decisions might easily be made that increase expenditure, creating difficulties in the future. It accepts that the biggest cost in any school is that of staff, which affects the nature of the curriculum that can be adopted and implemented. This financial strategy is underpinned by four distinct principles. These are:

- minimising expenditure
- income capture
- income generation
- capitalising on collaboration

Top tip: Plan the strategic management of resources.

The Ferrers Specialist Arts College has a three-year strategy in place for the management of resources.

Budgets for schools within the Darlington Education Village are 'built from zero' every year, based on an analysis of available data. 'The intelligent use of data and [a focus on] appropriate provision and intervention ensure that resources are effectively deployed,' says the vice principal business strategy.

The business manager for the Blackpool Federation costs all proposed changes to the curriculum before agreement is reached and changes are implemented.

Top tip: Ensure sustainability.

The governors of the Blackpool Federation recognised that economies of scale were achieved most effectively in schools with more than 800 pupils. This has informed their plans for the future growth of the federation.

The Outwood Academies Trust is committed to achieving a financial surplus at the end of each financial year. The 'save to spend' approach, adopted as part of the school improvement model, means that these savings are reinvested in learning or in projects that improve the facilities available to pupils, without affecting the core curriculum offer.

Initially, Cotgrave Candleby Primary School was provided with additional funding to support the amalgamation of three schools. This enabled it to put in place opportunities for pupils that cannot be sustained through the basic budget share. Further funding is therefore sought in order to maintain that provision, because governors and senior leaders are careful, in setting budgets, not to anticipate funding that is not already secure. As the business manager said, 'We err on the side of caution.'

An entrepreneurial culture and a 'can-do' attitude, resulting in additional income

Top tip: Identify new sources of income.

Senior leaders at Cotgrave Candleby Primary School believe that using the right people in the right job, matching roles and responsibilities well, and enabling people to be free to do what they want often leads to the creation of new ideas and the identification of new funding streams.

At Sir William Burrough School, a National Lottery grant of £80,000 funded new developments in the grounds and the cost of an artist in residence was covered by £70,000 raised by a local production company through an event of which the school was the sole beneficiary. Discretionary income such as this can act as capital or revenue funding, and contributes towards much of the transformational work that takes place within the school.

Top tip: Encourage a bidding culture.

The business manager described The Ferrers Specialist Arts College as 'responsive to a bid culture, practised in writing submissions and... well connected'.

Successful bids for funding at The Ferrers Specialist Arts College included:

- £5,000 for an orchard
- £22,000 for the British Council's Comenius programme
- £40,000 for disabled access
- £129,000 for specialist schools status
- £1.6m for a vocational skills centre

Top tip: Find new ways to access funding streams.

The Cotgrave Futures Group, a charitable trust, taps into pockets of money from a variety of sources to support the work of the school.

Charitable status enables Sir William Burrough School to access extra funding from commercial donors such as Unilever and the McFell Trust.

Top tip: Sell your expertise, facilities and services.

Cotgrave Candleby Primary School provided external services to colleagues in other schools through initiatives such as the National Support Schools and National Leaders of Education programmes. This generated £19,000 for the school in 2008/09 and a projected £26,000 in 2009/10.

The Ferrers Specialist Arts College receives £50,000 a year to provide training to other schools and £20,000 for its contribution to initial teacher training.

The business and training facilities developed at Outwood Grange Academy were not only used to provide courses to support schools across the north of England, but also training facilities for commercial rent.

Darlington Education Village offered ICT support to local primary schools, generating £280,000 annually.

Candleby Enterprises has developed and sells DVDs on phonics and modern foreign languages, and has plans to establish a market stall and, perhaps, in the future, a local shop.

Robust systems and structures

Top tip: Establish financial control.

The business manager for the Blackpool Federation is responsible for the overall management of the budget. However, the heads of teaching and learning hold some decision-making responsibilities, particularly in relation to the curriculum, professional development of staff, employment of supply staff and the purchase of consumable resources. They are expected to come in on budget and, if they want to spend more in one area, must make savings in another.

The three-school partnership of Darlington Education Village provides significant opportunities for sharing resources and the efficient management of resources. All financial processes are open and transparent and the budget for the three schools in the federation is pooled and aligned to the federation's plan. Resources are fairly distributed on the basis of students' needs and appropriate provision identified through careful analysis of data. Governors are actively involved in monitoring the village's budgets and ensure that any use of resources is an investment in improving standards. The finance manager monitors the budgets through monthly meetings with budget holders to review the current status of spending and to discuss progress and future proposals, linked to the school improvement plan.

At The Ferrers Specialist Arts College, decisions on staffing were taken at three levels - operational level, SLT level and governing body level. These three perspectives have generated a balanced staff base with, according to the headteacher, 'excellent retention features'. It reflects the value placed on staff as a resource and has resulted in, for example, an 'overstaffing' approach, the £90,000 costs of which have been fully met by savings of £25,000 in the supply budget, savings from employing staff to cover maternity leave of £50,000 and savings in the costs of replacement teachers to cover long-term sick leave of £15,000. It is an approach that ensures cover is provided by teachers who not only have the necessary subject expertise, but also a relevant and useful knowledge of school systems.

Top tip: Achieve value for money.

Darlington Education Village, through a tendering process, has a contract with Research Machines for the provision of ICT services for four years. Drawing on this contract, technical and procurement support is provided for an additional 30 primary schools in the local area. This generates an income for the village of £280,000 a year.

The Ferrers Specialist Arts College recently worked in partnership with four other schools to procure a £1.6m capital premises investment for each of the schools, through an innovative joint bid to the Learning and Skills Council. The bid was co-ordinated by the headteachers and the director of 14–19 education, who worked together on a tender that produced one contractor for all five buildings. The result is a state-of-the-art vocational skills facility for the performing arts at the college, including recording studios, a radio station and extensive mixing facilities, and complementary facilities in each of the partner schools. The work was completed in 2010.

Top tip: Save to spend; invest in the future.

The Outwood Academies Trust is committed to achieving a financial surplus at the end of each financial year. The 'save to spend' approach adopted as part of the school improvement model means that these savings are reinvested in learning or in projects that improve the facilities available to pupils, without affecting the core curriculum offer. These have included the building of a restaurant, the replacement of a roof, the refurbishment of changing rooms and the sixth form area and the establishment of an all-weather area and five computer suites.

Top tip: Be accountable.

The system of monthly meetings between the finance manager and budget holders at Darlington Education Village provided what the vice principal business strategy describes as a 'helicopter view' of the whole village's spending, enabling them to work together to identify potential over- and under-spends and ensuring that informed decisions were made about future spending.

FMSiS was introduced to Cotgrave Candleby Primary School in 2009/10 and was felt to be 'onerous to begin with', says the school's business manager. However, the internal audit provided clarity about the action needed to maintain some aspects of the school's approach to resource management and improve others, enabling a clear plan of action to be developed.

A commitment to identifying, developing and using knowledge and expertise and a willingness and determination to seek out and draw upon available social and intellectual capital

Top tip: Attract and retain staff with the potential to build capacity.

The Blackpool Federation attracts a larger than usual number of applications for teaching and support posts because it provides opportunities for staff to gain:

- a wider experience than would otherwise be the case within small, rural schools in this area of Devon
- promotion within and across the federation schools

In addition, the unique and cutting-edge nature of the federation attracts applications from self-selecting, high-quality teachers, as well as newly qualified teachers, which the executive headteachers believes provides 'a greater choice' for governors and senior leaders.

The administrative roles in each of the schools also attract applicants, because the usual pressures on administrative staff are relieved by the role of business manager. Within the federation, 'we are offering a do-able job at an attractive rate with a safety net of support,' says the business manager.

The senior leadership posts for heads of teaching and learning also prove attractive to potential candidates because they are designed to enable those filling them to focus on improvements in teaching and learning by relieving them of some of the responsibilities usually associated with headship, such as financial management.

Joint staff appointments made to the three schools within the Darlington Education Village were never made on the basis of replacing a post with like for like. Instead, a period of review was a standard part of the process to discover whether or not the need for a new member of staff might present an opportunity to create a new post more relevant to future needs.

Top tip: Develop and use the strengths of staff members.

Within the Blackpool Federation, intellectual capital was considered the most important resource available, underpinning everything else. From this resource came the ideas and energy that have enabled the federation to develop. The headteacher considers that, in securing sustainable, high-quality education in a context of increasing financial constraint, 'intellectual capacity wins the day and costs nothing'.

Senior leaders within the Blackpool Federation see themselves as responsible for:

"identifying the next round of leaders... developing people who don't think they are leaders, talent-spotting, nurturing, training, and then using that capacity across the federation to benefit the children."

Executive headteacher, Blackpool Federation

The director of strategy at Cotgrave Candleby Primary School said, 'It's about getting the best out of people, knowing where their strengths and weaknesses are, unlocking their potential and matching the person to the responsibility.'

Top tip: Actively seek external advice and support.

Darlington Education Village sought advice from value-for-money consultants, because benchmarking information currently available does not offer comparisons with PFI schools or federations.

Senior leaders at Cotgrave Candleby Primary School take full advantage of advice offered by the local authority on budget-setting and on issues to do with the school's provision of external services, including consultancy, advice and support, and training.

Senior leaders at Sir William Burrough School take advantage of advice and support from the local authority, which encourages, for example, the use of benchmarking sites and emphasises the importance of seeking best value.

Additional governors on the governing body of The Ferrers Specialist Arts College include representatives from the Royal Society for the

Protection of Birds, the Duchy of Lancaster and the University of Leicester. They provide new perspectives on resource deployment and the expertise of one of the governors enabled a thorough analysis of the budget position in a partnership with the school business manager.

The chair of governors at Blackpool Church of England Primary School came from a banking background. He helped to develop the vision for a federation of schools with the headteacher and is also active in ensuring that the governors play a significant role in strategic decision-making.

At Sir William Burrough School, governors are regarded as critical friends. Their induction programme ensures that they undertake this role with an understanding and appreciation of the culture of the school.

Top tip: Establish partnerships.

Partnerships between the Blackpool Federation and other organisations are largely in their infancy, but those already existing or in the exploratory or planning stages, include the following:

- **Local university:** The federation will provide action-research opportunities for students and this in turn provides access to academic realms for its own staff and pupils that might not otherwise be available.
- **Local authority:** The federation will support school improvement and enable the cross-fertilisation of ideas through the delivery of professional development, both within and across schools, and by sharing good practice and building a professional learning community, breaking down the silo mentality related to competition between schools.
- **Local schools:** There is a possibility of the federation forming a business partnership with other local schools that will enable it to achieve greater savings in the purchase of resources.
- **Local businesses:** Links with local businesses have contributed to developments in playground provision for pupils.
- **National College:** The federation is involved in a project on succession planning, which brings in additional revenue in addition to developing practice within and beyond the federation.

Cotgrave Candleby Primary School works closely with:

- **Local schools** at a practical level, sharing expertise, inviting pupils to take advantage of externally provided activities and sharing the use of minibuses. It also belongs to a family of schools that includes all feeder schools to the local comprehensive school and contributes to the provision of external services to those schools. It benefits from links with science and modern languages departments at the secondary school.
- The **local authority** offers a range of support for schools in relation to budget-setting, external services, consultancy, advice and training. Cotgrave Candleby Primary School takes full advantage of these to explore

opportunities for making savings or accessing additional funding from, for example, available grants.

- Links between the school and **local businesses** exist to benefit the local community. The school sees itself as brokering relationships between companies and community members. As a result, Barton Buses offers free bus travel for parents and children to get into the town in return for the school advertising the buses in its literature, and Severn Trent Water provides water bottles for the children as a means of raising the profile of the business within the local community. Blockbuster and UBC Cinema provide children and families with free access to films in the local cinema. As well as providing a community service, this generates funds for the school.
- The school works closely with members of the **local community**, including retailers, the town council, the local youth forum, the school nurse, police community support officers and the Citizens' Advice Bureau, to offer services to community members. Close links exist between the school and Cotgrave Community Gospel Choir. Children are not only provided with opportunities to sing with the choir, but also help to raise money to support its activities. The school is given free air-time on the local community radio station and produces a show broadcast each Sunday to 60,000 listeners, advertising the school and its activities. Following a recent article in the *Times Educational Supplement*, the school has received a number of enquiries about how to set up similar partnerships, extending its influence well beyond the local community.

Sir William Burrough School uses a financial consultant, who works within the local cluster of schools. He provides advice for the school business manager, enabling her to be more strategic in her role.

Shared understanding and a shared sense of responsibility for the management and use of resources

Top tip: Involve staff.

At Darlington Education Village, an impact evaluation meeting is held at the end of each year, when each budget holder reviews the year, identifies future needs and plans for the use of funding available to them during the following year.

The headteacher regards Sir William Burrough School as a 'democratic organisation', so that consultations involve many stakeholders. Discussions with staff inform budget decisions based on identified priorities, so that, if, for example, a big push is needed on maths provision, then maths will get the lion's share of the allocation. Pupils are involved through the school council. The school business manager believes that everybody has a voice in budget-setting:

"Decision-making on the budget goes from the top to the bottom. Children were recently involved in a resource decision on swings!"

School business manager, Sir William Burrough School

Top tip: Support staff members.

Within the Blackpool Federation, the executive headteacher acted as a coach and mentor for heads of teaching and learning. His role in relation to personnel issues, and that of the business manager in relation to financial issues, helped to take the pressure off the heads of teaching and learning and engendered collaborative working practice across the federation as a whole.

The chief executive of the Outwood Academies Trust meets on a three-weekly cycle with the vice principals to ensure that the agreed contact ratio of 0.79 is maintained.

Governors for the schools within Darlington Education Village were actively involved in monitoring to ensure that the use of resources was an investment in improving standards.

Top tip: Establish trusting professional relationships.

The vice principal business strategy at Darlington Education Village considers that accountability and trust is a major factor underpinning the effective implementation of budget management. Four members of the village support team have completed the Certificate of School Business Management (CSBM). They have a common understanding of the village's processes, can cover for one another and offer consistent messages:

"They are highly valued across the organisation. If someone doesn't know or understand something, they come to the village support team for advice. There are absolutely no issues of status or difference between teachers and support staff."

Vice principal business strategy, Darlington Education Village

Initially, senior leaders held responsibility for development of the budget and the identification of priorities for spending within Darlington Education Village. However, as the work of the village has become more established and relationships between staff in the different schools more trusting, these responsibilities have been progressively devolved throughout the schools, with budget managers responsible for their own budgets, spending decisions linked to costed action plans and monthly meetings with the finance manager to review progress. This has led to a common commitment not to spend unless it is necessary.

Openness to challenge

Top tip: Welcome challenge.

Senior leaders at The Ferrers Specialist Arts College found that FMSiS provided a good checklist, which, used alongside benchmarking information available from the local authority, helped them to ensure that the school's systems dovetailed with its approach to provision and improvement and enabled them to be, in the words of the principal, 'prudent'. They welcome continual challenge from external bodies such as Ofsted to ensure value for money and particularly value an annual audit, conducted by the local authority, that checks the school has followed best-value principles.

Top tip: Be prepared to challenge.

The executive headteacher and business manager of the Blackpool Federation, with the support of the governing body, made a successful case for reducing the payment to the local authority for the provision of support for human resources. They argued that it was unfair to make a charge for services that related to the number of schools within the federation rather than the number of pupils, and compared the demands made on the local authority service and the relative costs with those of a secondary school serving the same number of pupils. The executive headteacher of the federation comments that the size of the federation puts it on 'a level playing field' with secondary schools and gives it 'more clout'. Governors and senior leaders feel more able, as a result, 'to demand and get more money'.

Close monitoring of the budget disclosed that Darlington Education Village was entitled to more funding than it had received. A challenge to the local authority resulted in an increase to revenue funding of £275,000 a year.

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