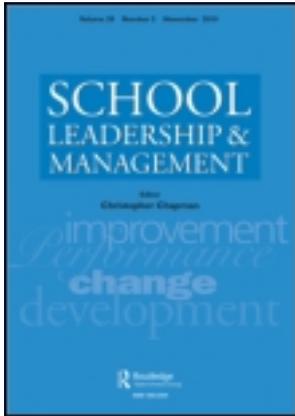


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Publisher: Routledge

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## School Leadership & Management: Formerly School Organisation

Publication details, including instructions for authors and subscription information:

<http://www.tandfonline.com/loi/cslm20>

### Facilitating primary head teacher succession in England: the role of the School Business Manager

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Available online: 13 Apr 2012

To cite this article: Charlotte Woods, Paul Armstrong & Diana Pearson (2012): Facilitating primary head teacher succession in England: the role of the School Business Manager, School Leadership & Management: Formerly School Organisation, 32:2, 141-157

To link to this article: <http://dx.doi.org/10.1080/13632434.2011.642352>

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## Facilitating primary head teacher succession in England: the role of the School Business Manager

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School leadership is significant for student learning, but increased workload and complexity are believed to be in part responsible for the difficulties internationally in managing succession, with experienced leaders leaving the profession prematurely and potential future leaders reluctant to take on the role. This article draws on a national government-funded programme of inter-school collaborations in England. Focusing on data from four primary clusters, it explores head teacher perspectives on the ways in which the expertise of a senior School Business Manager was seen to be supportive of head teacher succession within these partnerships through its impacts on the working life of the head teacher at different career stages.

**Keywords:** head teacher succession; primary school leadership; professional support staff; School Business Management

### Introduction

Drawing on data from a national study of government-funded, inter-school collaborations in England, this article considers the potential of senior School Business Managers (SBMs)<sup>1</sup> to support the succession of head teachers within primary partnerships. After teaching, school leadership is understood to be a key influence on student learning (Leithwood et al. 2006; MacBeath 1998; Printy 2010). Yet, the heavy workloads and complexity associated with school leadership are believed to be in part responsible for the current difficulties internationally in recruiting and retaining suitable candidates for leadership posts (Anderson 2011; Whitaker 2003). According to Rhodes, Brundrett, and Nevill (2009), ‘creating and sustaining an appetite for headship in England ... has never been more important’ (452). This article employs interview evidence from primary head teachers who had recently embarked on inter-school collaborations, presenting their views on how SBMs can impact on the working lives of current and aspiring leaders in ways that have implications for succession. Head teacher succession was not the focus of the study and the article is somewhat speculative. However, it is particularly timely, as the government in England is currently funding almost 200 primary partnerships employing senior SBMs.

In common with other Anglophone countries, over the last 25 years or so, increasing demands have been made on head teachers in England (PriceWaterhouse-Coopers 2007). This has occurred as a result of trends such as: the devolution of management to individual schools since the Education Reform Act of 1988

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(Caldwell 2008); the growing quantity and sophistication of data implied by the education quasi-market (Foskett 1998); increased numbers of support staff through workforce reforms (Gunter and Butt 2005); and the expectation that schools will work with other agencies to provide services beyond basic education and outside traditional school hours (Department for Education and Skills 2003).

In 2001, a government-commissioned report found that head teachers in England had seen their workloads increase more significantly than many other professionals and underscored the potential of suitably qualified SBMs to take over some of the increasing number of administrative and financial tasks from educational leaders (PricewaterhouseCoopers 2001). Largely in response to this report, the then New Labour government in England began concerted efforts to 'professionalise' a historically disparate and fragmented section of the education workforce involved in school finance and administration (Wood et al. 2007; Woods 2009). In 2001, the National College<sup>2</sup> launched the first of a suite of nationwide programmes for SBMs. These would offer a means of recruiting, developing and accrediting SBMs and of providing a clear career pathway for the profession.

It is important to note that all the programmes developed by the National College for the preparation of SBMs, whether at entry, mid-career or advanced level, were premised on a broad professional remit, and one that is far removed from the narrow focus on finance often associated with the traditional school bursar role. Each programme has at its core the notion that SBM decision-making must be driven by educational and child welfare imperatives. In common with wider workforce reforms under way at the time, an explicit goal of the programmes was to enable greater attention to matters specifically related to teaching, learning and pupil welfare among education specialists by removing workload in other areas.<sup>3</sup>

Current policy plans to increase efficiencies in the use of financial resources stress the duty on schools to ensure that they have access to adequate SBM expertise. Like the previous New Labour government, the first Conservative-Liberal Democrat Coalition schools white paper acknowledged the potential for reducing the administrative workload on head teachers provided by an expert SBM (Department for Education 2010). However, in the current economic climate, there is an inherent danger that school business management comes to be understood solely as a means of cost reduction and income generation. This article therefore focuses on perceptions of the potential relevance of the function in an area more readily linked to educational outcomes: the matter of leader supply.

In 2008, the National College launched a programme of 'SBM demonstration projects', within which groups of schools were tasked with devising ways of sharing advanced business management expertise (National College for Leadership of Schools and Children's Services 2010). This article arises from research on this programme. Specifically, it draws on data from primary head teachers with first-hand experience of a novel form of school partnership. Unlike federations, where educational leaders assume responsibility for more than one school, in this arrangement, a head teacher retains control of each school but is supported by a senior SBM working across the grouping.

Head teachers in primary schools can be especially subject to stress, in part due to often very limited opportunities for delegation (Chaplain 2001). However, few such schools can afford the services of a professional SBM. Employing SBMs to work

across groups of small primary schools is one strategy for supporting these head teachers, including small, rural primaries threatened with closure (Walker 2010).

This article adds to existing research and theory in school leadership in a number of ways. First, it considers a novel strategy for addressing the pressing problem of primary head teacher succession, and one which is consistent with the current policy drive towards collaboration within the public sector in England and other national contexts (Sullivan and Skelcher 2002). Second, it raises awareness of a new form of school partnership currently being supported by policy-makers in England. Third, in contrast to the relatively well-established role of the SBM/Bursar in the secondary phase, the article draws attention to the less well-understood territory of the leadership contribution of the senior SBM within primary schools. Finally, it offers a framework for understanding the various ways in which, working across a partnership, an SBM may facilitate primary head teacher succession by influencing educational leaders' professional lives at different career stages.

By way of background, the article first provides a sketch of relevant research and policy and an outline of the study. In presenting findings, it draws briefly but principally on interviews with primary head teachers, who made up the majority of educational leaders taking part in the programme. It reviews the evidence in relation to the working lives of educational leaders, the complementary nature of SBM expertise and ways in which this expertise was perceived to support head teacher succession. The article concludes with a discussion of the strengths and limitations of the partnerships as a means of influencing leader succession and summary remarks.

### **Context for the study**

Educational policy in England in recent decades shares common ground with that of many other industrialised nations in attempting to ensure competitiveness in the global economy (Chitty 2009; Levin 2004; Torres 2009). De-centralisation, standardised testing and the pressures of the education quasi-market among other trends have led to significant changes in schooling (Whitty 2008). Since the 1988 Education Reform Act, much of the administration of schools has passed from Local Authorities (LAs) to head teachers and governing bodies (Caldwell 2008), and increasingly schools in England have been encouraged to bid for and manage large sums of money (Levacić 2008). Alongside these developments, there has been an explosion in the use of information and communication technologies, for both educational and administrative purposes, and an increasing demand for data from schools to support national mechanisms of accountability and comparison (SATS scores, league tables, etc.) (Foskett 1998).

What is taught in English schools, and how, have both been overhauled via the introduction of the National Curriculum during the same period. Meanwhile, workforce reforms designed to support individual learners, teachers and the wider 'social care' function have resulted in a rapid increase in numbers and a proliferation of roles among 'associate professional' colleagues in schools during this period (Edmond and Price 2009; Gunter and Butt 2005). Further, the government green paper *Every Child Matters* emphasised collaboration among schools and between schools and other agencies (e.g. health and social workers) to provide integrated educational and welfare services (Department for Education and Skills 2003).

The implications of this unremitting pace of reform on the professional lives of head teachers have spawned a large body of research internationally. Of particular relevance to head teacher succession are strands of research in relation to: (1) how the head teacher role has changed in recent decades and the influence of this on incumbents' sense of professional identity and commitment to the role; and (2) head teacher professional preparation and the transition to headship.

First, studies point to significant changes in the work of head teachers in England amid the shifting policy context outlined above. The administrative workload associated with the role intensified with the devolution of management from LAs to schools and the necessity to compete for students and resources within the education quasi-market. Meanwhile, educational reforms have also required new forms of specialist knowledge (e.g. in marketing, Human Resources Management, finance, Health and Safety, Information and Communications Technology). Further, the policy drive for more outward-facing schools, which collaborate with other schools and agencies, implies more varied and more numerous professional relationships for head teachers. As a result of these policy changes, both primary and secondary head teachers typically spend less time in the classroom than they once did and can feel disconnected from their core purpose of developing quality in teaching and learning (PriceWaterhouseCoopers 2007). They are also at risk of becoming so overwhelmed by operational matters that they struggle to pay adequate attention to regional, national and global developments and to longer-term thinking (Bottery 2007; Jones 2009; PriceWaterhouseCoopers 2007).

A common theme within critical scholarship in relation to schools policy is that centralised reforms, with their focus on measurement, management and supervision, have required a change of professional identity, leading to stress, disaffection and alienation among some members of the education community (Ball 2003; Kirk and Wall 2010; Swann et al. 2010; Woods and Jeffrey 2002). Particularly among primary head teachers, the new managerial ethos may be at odds with the more child-centred, holistic approach to education that had prevailed in head teachers' professional preparation and earlier careers, which relied on trust between colleagues and between teacher and parent (Forrester 2005).

Second, studies of aspiring and early career head teachers in different national contexts point to reluctance among middle leaders to take up headship and the sometimes overwhelming challenges experienced during the early stages of a first appointment (see, for example, *Journal of Educational Administration* 44(4), dedicated to the early career of principals internationally). Studies stress the importance of informal work-based learning as a supplement to formal training in supporting aspiration and transition (Anderson 2011; Crow 2007; Kelly and Saunders 2010; Rhodes, Brundrett, and Nevill 2009) and emphasise the value of relationships with leaders both prior to taking up post and in the early career. Networking, mentoring and coaching are highlighted as key in helping new head teachers to negotiate successfully the demanding processes of socialisation and role-identity transformation implied. Other leaders are seen to play a significant part in developing management and administrative knowledge and in helping new incumbents to deal with the initial shock at the demands of their new role and sense of isolation that is often experienced. Areas identified as ones for which new head teachers are most likely to feel ill-prepared include finance, people management and site and premises management (Rhodes, Brundrett, and Nevill 2009).

Although the conceptualisations of professionalism and identity underpinning the above analyses differ, they present a similar picture of a group of professionals under pressure and of a role that fewer are willing to take up. In attempting to address predicted problems in recruiting and retaining an adequate pool of head teachers, for a decade one strand of schools policy has concerned the development of SBM expertise nationally to better support educational leaders. Prior to these concerted attempts to 'professionalise' this aspect of school leadership, in England there were marked inconsistencies in the way business management duties were discharged in schools, the titles of postholders, their levels of operation, qualifications and levels of remuneration (Woods 2009). Although secondary schools have long employed senior support staff with primarily financial responsibilities (e.g. Bursars or Finance Officers) or other roles (e.g. site, premises, office or IT managers), SBM posts were rare 10 years ago in secondary schools and are still uncommon in the primary sector (Southworth 2009).

Recent work suggests that SBMs in England are now beginning to play a more central part in schools and bringing to the fore the aspirations, professional development and leadership of the growing number of other non-teaching staff in schools (e.g. Aldridge 2008; Mertkan 2011; National College for Leadership of Schools and Children's Services 2009). New models of school collaboration and leadership are evolving in the form of federations and other partnerships (Arnold 2006). These developments are creating career structures and opportunities for administrative staff in general and for SBMs in particular. Although the numbers are as yet very small, some SBMs are now undertaking the National Professional Qualification for Headship (NPQH), which is mandatory for new head teachers in state-funded schools. A change in legislation has potential to further enable SBM professional advancement: the requirement for academies (schools funded by central government but free from LA control) to employ a qualified accountant was removed by the then newly elected Coalition government in summer 2010.

The SBM Demonstration Project Programme that informs this article constituted a significant departure from the previous National College programmes offering formal, accredited training at different levels. In order to participate in the programme, single or mixed phase groups of schools were required to submit collaborative bids for funding to the National College. School partnerships were to use the funding from central government to enhance educational leadership within the project schools by boosting SBM capacity. In order to encourage new and creative forms of partnership that others could learn from, the number and type of organisations to be involved in a single demonstration project was not stipulated, nor were the means by which SBM expertise would be deployed in the interest of effective leadership. Indeed, a variety of collaborative forms evolved, with markedly different purposes and approaches to augmenting SBM capacity. For example, projects developed or exploited existing talent in new ways, or made new, often shared, senior SBM appointments, or paid external consultants at a daily rate (Woods et al. 2011).

The study findings have since contributed to the development of an extensive set of resources that are available to groups of schools interested in establishing primary SBM partnerships (National College for Leadership of Schools and Children's Services 2010).

### **Study design**

The head teacher data discussed in this article formed part of a large-scale, multi-method evaluation study during 2008/2010 (Woods et al. under review). The evaluation involved gathering a wide variety of data, including quantitative surveys, head teacher diary data and case study work in each of 35 partnerships in which bespoke, shared SBM solutions were developed by more than 300 schools working collaboratively in small groups with other schools and agencies.

For the purposes of the current article, a portion of the project data has been interrogated for evidence in relation to head teacher succession. It draws briefly on questionnaire and primary head teacher diary data but principally on case study evidence. Case studies offer a useful supplement to large-scale quantitative work in policy development in 'helping to establish the limits of generalizability' and in offering a 'disciplined force . . . in reflecting on human experience' (Stake 2005, 460). It is the experience of primary head teachers that is most germane to this article, and it is therefore interviews with 12 head teachers in four clusters of 4–6 primary schools that form the principal source of evidence on which this analysis is based.

From the perspective of the interviewees, these four were demonstration projects that were deemed to be making satisfactory progress at the time of the study. They all involved schools that had little or no prior history of collaboration and had previously enjoyed limited financial and administrative support. The demonstration project had acted as a stimulus for closer collaboration and through the project each cluster had recruited a senior SBM to provide strategic leadership in all areas of school business management.

An individual researcher was assigned to each case, which draws on a mix of qualitative and quantitative data (e.g. observation, documentary data, semi-structured and more open-ended interviews with key informants, questionnaire surveys) to develop an understanding of the setting. In order to generate new ideas or insights, these data were 'coded up' by the researcher in preparing individual case reports (Fielding 2008, 334). Through an iterative process of reading, discussion and re-writing case reports among members of the research team, a flexible broad structure in the form of a series of headings was developed for writing up cases and analysis across cases was facilitated. Final case reports were forwarded to study participants to check for accuracy and for comment.

### **Signs of strain**

Consistent with research referred to above, head teacher diary and interview data in the study left little doubt that their role without qualified SBM support prior to the project had been a demanding one. Head teacher diary data provided a broad indication of the hours worked and the types of work-related activities engaged in by head teachers. At an early stage of their projects, head teachers were asked to record their work activity in 30-minute blocks over a 24-hour period using a simple proforma, for seven days. Usable diary returns were received from 46 primary head teachers across 16 demonstration projects in the early stages. Although the hours worked varied considerably, diary data indicated a widespread tendency for the programme head teachers to devote a high proportion of the week to school-related business. The shortest recorded week was 36.5 hours (the only one under 40 hours),

with approximately a third (15 of the 46 respondents) recording a working week in excess of 60 hours.

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

Especially among experienced primary head teachers, a shift in emphasis had been noted over the last two decades or so, away from engaging with children and teachers and towards a more significant focus on finance and administration. Findings reflected the fact that head teachers in small primary schools particularly, where potential for delegation is often highly restricted, can find that the many and often pressing calls on time and attention can prove a distraction from their main role as educational leaders. Inexperienced head teachers can be particularly vulnerable to the administrative demands being made of them, as it is difficult for them to know which tasks can and cannot be ignored. An experienced primary head teacher talked of how they had developed confidence to resist what were considered unreasonable or unproductive demands being made of them in a way that a new incumbent would be unable to do.

In evidence in some of this testimony was a strong commitment to the care of the whole child, as emphasised in the critical scholarship cited above as a significant part of professional identity among primary colleagues. The many demands on their attention prior to the project were perceived to be in conflict with this aspect of their role and caused tension for some:

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

But it's not just the academic side of things. It's really getting to know your kids very well and that, I would say particularly in primary, is absolutely crucial.

For a proportion of this group of leaders, coupled with heavy workload and uncertainties about how to prioritise, this shift in emphasis in their professional life had given rise to feelings of guilt, anxiety and loss of confidence and motivation and even, in the more extreme cases, health problems:

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

I got to the point where stuff came across my desk and I didn't know what to do with it ...I couldn't actually make sense of anything because I wasn't taking anything in.

The following section provides illustrative examples of ways in which project SBMs were seen by their head teachers to offer a means of alleviating some of the work pressures that had been impacting adversely on their motivation and effectiveness.

### **Complementary expertise**

Questionnaires revealed that qualified SBMs were perceived to be improving the professional lives of the demonstration project programme head teachers considerably. In projects just a few months from the start, 91.4% already stated that SBMs were having a favourable impact on their workload and 83% on their job satisfaction, with 86% believing favourable impacts would increase over time. The government funding that supports the demonstration project schools may have introduced a bias towards favourable responses and due caution should therefore be exercised in interpreting these questionnaire data. However, the enthusiasm for the SBM role among head teachers at interview seemed genuine and supports these numerical evaluations.

Interviewees illustrated a variety of ways in which the complementary expertise of SBMs on the programme was impacting on head teacher workload and on their confidence that work was being done well. Ensuring schools are compliant with regulations in safeguarding the children in their schools was commonly cited as a source of stress for head teachers:

Health and Safety? It's the Head's biggest nightmare. I have handed that over to John [SBM]. It's been absolutely wonderful. When Ofsted came, the relief I felt! Before I would have been thinking, 'Oh my god have I got this right?' and that is an incredible burden off my shoulders.

The threats from not doing what the SBM does can be overwhelming, like not getting health and safety right. I mean people have said to me 'if you don't do this right, you could go to prison'.

Health and Safety was therefore a key area where SBM expertise was especially valued by interviewees, both because of the complexity involved and because of the consequences of doing an inadequate job.

Second, because of the complexities of employment law, Human Resource Management (HRM) tasks were identified as being both time-consuming and stressful for primary head teachers, who often believed that they lacked expertise in this area. In contrast to guidance from other sources, SBM advice was especially valued because it was provided quickly and was tailored to the specific school context:

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

School staff costs typically represent much the largest proportion of any school's outgoings, therefore good HR practice is an important aspect of school effectiveness. Activities in the area of HRM, such as recruitment, induction, succession planning, dealing with sickness absence and professional development, are therefore essential

but can be ones for which head teachers feel ill-prepared (Rhodes, Brundrett, and Nevill 2009).

A third example where the professional expertise of SBMs was seen to be making a difference to the working lives of head teachers was in premises and site management:

I actually went round [the school] with my deputy saying ‘That needs doing and that needs doing’. In the past I would have almost tried not to look because of the thought of having to get the quotes and deal with contractors. I was able to pass it over to the SBM. She will get far better prices than I would get.

Managing building projects was cited as a significant source of stress for head teachers. Conducting research and dealing with contractors were ways that SBMs were saving head teachers time and reducing costs in site and premises management.

Connected to this last point, perhaps unsurprisingly a fourth example concerned finance, the traditional focus of attention of the school bursar. This was an area commonly referred to by head teachers as one where SBMs were making a significant difference to their professional lives. Head teachers commonly admitted that due to lack of expertise and time, they were not always convinced that public money was being put to the most effective use in their schools for delivering pupil outcomes. In these cases, their SBMs were giving confidence that financial resources were being deployed effectively.

### **SBMs and primary head teacher succession**

Head teacher interviews indicated that having a suitably qualified and experienced SBM could impact on educational leaders within a partnership at different career stages and in ways that could favour effective succession management. It is these insights that are presented in this section.

#### ***Aspiring head teachers***

Interview data pointed to two main ways in which SBMs could address the problem of reluctance among middle leaders to put themselves forward for headship. First, effective SBM provision, with its potential (1) to re-align the focus of the head teacher role towards the children and staff in their school and (2) to relieve some of the work pressure, was seen to be important in making the job more attractive:

Our deputies are seeing the impact that Sam [SBM] is having on our schools and these are the next generation of headteachers.

I’ve got a young teacher who has finished his NPQH. You talk to him and he says, ‘Yes I would do headship with a business manager’.

School Business Manager provision was therefore believed to support succession by removing what programme head teachers perceived to be the main *barriers* to recruitment and retention: a loss of focus on the core task of educational leadership and pressure of work. A number of interviewees commented that deputies were already beginning to see the benefits SBMs were bringing for their head teachers, and

that this was making them consider more seriously the prospect of putting themselves forward for the ‘top job’ in future.

Second, SBMs were perceived to enable the successful transition of deputies through mentoring in key management areas prior to taking up a headship:

I have got lots of enthusiastic young staff who he'll [SBM] be able to mentor. When I went into Headship ... I didn't know what to do initially. You were thrown in at the deep end.

Respondents referred to the fact that deputies can be granted limited access to aspects of the head teacher role and therefore unable to develop adequate expertise:

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

Through targeted on-the-job professional development in the less familiar financial and administrative dimensions of the leadership role, informants thus saw the potential of SBMs to awaken interest and increase confidence and skills in their deputies in these aspects of the job.

### *New head teachers*

A suitable SBM was proposed as a means of easing the often immensely challenging transition into the first experience of headship as new or acting heads. In one project, an interviewee spoke of a period of extended absence due to stress early in their first headship. They were convinced that, had they benefited from the support of a qualified SBM at the time, they would not have fallen prey to the pressures that had caused their earlier health problems. They were unequivocal about the benefits of the new SBM arrangements for their professional lives and could not countenance a return to a situation where they were no longer available:

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

Another acknowledged the important support provided by their SBM for a deputy who had stood in for them:

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

Partnership SBMs were viewed by these head teachers as providing a means of reducing pressure and acting as a source of specialist expertise where it is often most needed by those new to headship. Such support was considered to be a means of helping inexperienced head teachers to negotiate the crucial first months in post and ensure their successful integration into the new role.

### ***Dealing with challenge***

Head teacher interviews revealed evidence of ways in which a suitable SBM could assist head teacher retention by providing targeted support at critical times. Examples mentioned included taking up a new post (1) in a larger or more complex organisation<sup>4</sup> or (2) alongside recent changes in key members of the leadership team:

My governors have already been raising the situation of succession. It was a junior school and then we developed primary, then nursery came on board and now we have got fully fledged children's centre provision. The issue for my governors is who in the future would want to take on that role. It's a big job and it would be daunting.

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

In the early stages of one demonstration project, an experienced and well-respected head teacher of an inner-city primary in challenging circumstances had been required to step down after the school received what the LA considered to be an unsatisfactory inspection report. She subsequently commented that the project had brought home to her that having had the support of an effective SBM earlier might have enabled her to take effective remedial action sooner and kept her in post.

Such evidence provides examples of ways that interviewees believed an SBM could support the head teacher at critical times, which in turn might help to keep them in post, so that their knowledge and experience are not lost to the profession.

### ***Retaining experienced leaders***

Finally, interviewees pointed to ways in which SBMs could address succession by helping to retain experienced and effective leaders considering early retirement. Experienced head teachers gave examples of the types of opportunity created by their SBMs for obtaining welcome professional stimulus and renewing commitment. In one case, a head teacher had been encouraged to take on the role of National Leaders of Education,<sup>5</sup> which might prevent their early retirement:

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

A second example of development opportunities cited by respondents was one that research indicates is all too rare for head teachers (Rhodes, Brundrett, and Nevill 2009; Woods, Woods, and Cowie 2009): the time and 'space' for reflection and taking stock:

It can give us an opportunity as heads to step back and see what are we *not* doing or what have we put to one side . . . With so many people wanting your attention, it [having an SBM] helps you to actually release some of your own time so that you can give that attention.

A third example of ways in which interviewees saw SBMs as providing professional stimulus was through the very different perspectives on school leadership that they bring with them:

The project is like a vehicle for moving things forward. There's been a fantastic amount of learning. I mean superb. I've had my mind blown this year and really challenged in terms of where things could go.

Some head teachers found that the fresh ways of thinking and the longer-term perspective of their SBMs were causing them to question assumptions, opening their eyes to new possibilities.

Although the data presented in this section are anecdotal, the level of conviction often demonstrated by these primary leaders at interview was compelling. Taken together, their comments are noteworthy in that they indicate that a suitable SBM, working at a senior level across a primary cluster, has potential to influence the working life of the primary head teacher significantly at each stage of the career cycle. In this way, this form of partnership might offer a promising additional approach, within a locality, to tackling the complex and important question of educational leader supply.

### Discussion and conclusions

In bringing together ideas presented so far on how the SBMs in these clusters were relevant to head teacher succession, the four elements of a SWOT (strengths, weaknesses, opportunities and threats) analysis will serve as an organisational device. First, by allowing educational leaders to focus more effectively on educational leadership, project SBMs were allowing them to work to their *strengths*. Interviewees in successful projects conveyed the clear message that they were being enabled to develop the depth of connection with their staff and pupils, and with the families and communities to which they belong, required for the effective leadership of teaching and learning. The ability to better exercise this professional expertise was enhancing the job satisfaction of existing head teachers and was perceived to make the transition to headship more attractive to their deputies.

Second, head teachers indicated that SBMs were providing valuable support in areas commonly perceived to be of relative *weakness* in terms of professional expertise. SBM expertise closely matches those content areas where research (PriceWaterhouseCoopers 2007; Rhodes, Brundrett, and Nevill 2009) indicates that head teachers can feel least well prepared (e.g. finance, HRM, technical and legislative areas, site and premises, networking). Through lessening workload and targeted advice in these areas, head teachers reported reduced anxiety about making mistakes and increased confidence in the quality of management. SBM expertise was thus believed to support the retention of heads by improving the quality of working life.

Third, the findings illustrate how programme SBMs were providing opportunities for the professional development of head teachers at different career stages. Interviewees saw these opportunities as supportive of head teacher recruitment and retention and, as supported by research studies, as a valuable supplement to formal training through on-the-job coaching and mentoring of deputies, or head

teachers, in specific areas, or through freeing up time for reflection, or for new challenges among experienced heads (Anderson 2011; Crow 2007; Kelly and Saunders 2010; Rhodes, Brundrett, and Nevill 2009).

Fourth, the interview data present examples of the ways SBMs were seen to reduce potential *threats* to head teacher retention by offering substantial and well-targeted support or development in times of vulnerability (e.g. early or late career stage or schools in challenging circumstances). Given the number of years required to develop the knowledge and experience needed for headship, retaining suitable educational expertise within the system will be a key factor in ensuring educational quality.

The study findings thus lend tentative support to the idea that senior SBMs working across primary partnerships might be a means of influencing the supply of leaders. However, the head teachers interviewed were all participants in projects that had bid for funding via the SBM demonstration project programme. It is therefore unsurprising that they would be well-disposed to the idea of exploiting the complementary professional expertise of their SBMs. Interviews with these head teachers and their SBMs also indicated a number of caveats, however.

First, research participants referred to what might be viewed as attitudinal barriers stemming from differing professional perspectives. From the point of view of educational leaders, these included: being reluctant to delegate any but low-level administrative duties because they are held accountable for decisions taken in their schools; worrying that their jobs might be threatened by the introduction of non-teaching leaders; or feeling hostile to the rise of business practices within education or to the idea that people who are not trained as educators should have a say in how schools are run (Hallinger and Snidvongs 2008). For their part, SBMs freshly imported from the private sector spoke of the significant frustrations and adjustments required in adapting to a school environment. Although the business and finance sector offers a source of potential applicants for SBM posts with appropriate management and finance expertise, the study also indicated that a willingness to learn and adapt will be essential for such candidates. Highly significant in terms of the ability of SBMs to offer effective support to aspiring and current educational leaders will be the adaptability and openness of the leaders themselves, therefore.

Second, sustainability of the SBM arrangements beyond the project term was viewed as a key concern among participants, either through the anticipated loss of a particularly committed SBM, or because of lack of funding to pay for a new SBM post over the longer term. Questionnaire and interview data indicated that school governors vary widely in their attitude to the SBM role. Not all will accept the argument for SBM expertise, especially in the primary sector, and some may therefore be unwilling to agree funding for posts at the required level. While there was a strong commitment to retaining the SBM role among the head teachers we spoke to, it was not always clear how this would be achieved financially over the longer term.

Participant testimony suggested that head teachers who are persuaded of the benefits of SBM expertise for their own practice have a role to perform in actively developing the understanding among school colleagues, other head teachers, governors and other stakeholders about the ways that the SBM role complements their own in bringing about school outcomes. Similarly, the most effective SBMs will be able to communicate the relevance of their role for pupil outcomes to a wide-ranging audience: the associate staff they will often lead or manage; head teachers and other teaching colleagues; parents, governors and LA colleagues. This requires

confidence, resilience and commitment along with highly effective interpersonal and mass communication abilities. This implies that successful SBM recruitment and selection processes will be critical to the impact of SBMs locally and nationally on the succession of educational leaders.

Finally, although the data presented here formed part of a relatively large-scale study, investigating head teacher succession was not its primary purpose. Research providing a longer-term view and with a specific focus on the topic would be required to assess the relevance of effective SBM support for educational leader succession. A significant challenge in this respect in terms of study design would be to disentangle the effects of SBM support from the plethora of changes in school structures and personnel that characterise many school settings. Although widely contested within education practice and scholarship communities, the incursion of business practices within the schools sector is well advanced in England (Ball 2008; Hallinger and Snidvongs 2008; Levacić 2008). Factors such as the policy intention to free schools from LA control and the complexities in current arrangements for funding schools strongly indicate that the SBM role is due to come into greater prominence in future. With the recent schools white paper (Department for Education 2010) underscoring the obligation on schools to ensure effective SBM support, the time is now ripe for research exploring the relevance of the SBM function for leader succession and for educational outcomes more broadly.

### **Acknowledgements**

The authors would like to express their gratitude to colleagues in the SBM Demonstration Project Programme for their enthusiasm, patience and commitment in acting as study participants, and to the National College who commissioned and supported the evaluation work upon which this article draws.

This article develops and extends work presented at the following conferences:

- British Educational Leadership, Management and Administration Society Conference, July 2010, Reading, England;
- International Congress for School Effectiveness and Improvement, January 2011, Limassol, Cyprus;
- British Educational Research Association Conference, September 2011, London, England.

### **Notes**

1. Various terms are used to denote senior business management posts in England. The generic SBM is adopted here.
2. The National College for School Leadership (NCSL) was launched in November 2000 to deliver leadership programmes, support research and stimulate innovation and debate.
3. The competency matrix produced by the National College with the National Association of SBMs provides a good overview of the expected roles of the SBM at different career stages (National College/NASBM 2009).
4. For example, large primary schools offering nursery and specialist Special Needs provision and extensive community services.
5. This is a government programme in England within which effective leaders work with their schools to support other schools in challenging circumstances.

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