

MEETING:	SCHOOLS FORUM
DATE:	1 NOVEMBER 2010
TITLE OF REPORT:	PROGRESS REPORT FROM THE WIGMORE AND BROMYARD CLUSTERS ON THE IMPACT OF THE NATIONAL SCHOOLS LEADERSHIP COLLEGE PILOTS ON SCHOOL BUSINESS MANAGEMENT
Article 1:	BROMYARD CLUSTER INTERIM REPORT
Article 2:	WIGMORE CLUSTER INTERIM REPORT
REPORT BY:	Head teacher, St Peter's Foundation Primary School, Head teacher Queen Elizabeth Humanities College (QEHC) and Head teacher, Wigmore High School

CLASSIFICATION: Open

Wards Affected

County-wide implications. Review based on Bromyard Cluster schools.

Purpose

This interim review seeks to evaluate the effectiveness of the Bromyard Cluster School Business Manager (SBM) project to date and to consider key implications for any similar projects.

Recommendation(s)

THAT:

- (a) **Within the Bromyard Cluster (from 1st November, *Education for Bromyard: a Cooperative Trust, EfB*) the six primary schools consider whether the School Business Manager project be embedded at the core of its Trust infrastructure and that QEHC should be a full partner;**
- (b) **In the broader local authority education structure this approach be considered as a potentially effective model of good administrative practice.**

Key Points Summary

- In order to assess the effectiveness of the SBM pilot project within the Bromyard Cluster two key criteria have been identified, namely improving usage and effectiveness of Headteacher (HT) time, and effective financial stewardship within the project.
- There needs to be an assessment as to whether the perceived advantages demonstrated by the pilot provide value for money when the various options for long-term funding have been explored.?

Alternative Options

- 1 The only alternative to a dedicated SBM working across the Bromyard Cluster is a return to the *status quo* before the pilot project began, *viz* each school working independently with the human resources at its disposal, viewing the pilot as an exercise which has exemplified good practice and improved the staff skill base.

Reasons for Recommendations

- 2 This project is currently under review. This submission is part of the ongoing review process. For that reason, no firm recommendations can currently be made.

Introduction and Background

- 3 In 2008 two Herefordshire local authority school clusters, Wigmore and Bromyard, were successful in bidding for NCSL / Local Authority funding to establish pilot School Business Manager projects. The Bromyard appointment was effective from September 2009.
- 4 As part of the wider strategic analysis within the Bromyard Cluster it was considered sensible to merge the responsibilities of Extended Schools Coordinator with that of SBM. This had the added benefit of affording sufficient total funding to extend the project over an initial two years.
- 5 In the Bromyard model, it was resolved to base the SBM at the secondary school in order to proffer the new appointee adequate wider support within the QEHC administration team. Technically, the SBM is an employee of QEHC, though funded from external sources, but working for the interest of the primary schools.
- 6 The Cluster HTs and Chairs (HTC) Group initially worked on the bid, and line management was shared by one of the primary Chairs. In the spring term of 2010 the HTC group devolved line management and performance management responsibilities to the HT of St Peter's Foundation Primary School.
- 7 The HT of St Peter's and the SBM have begun working on an SLA-type approach to ongoing funding for this post, as detailed below.

Key Considerations

- 8 In the Bromyard context the key considerations are firstly, the desirability or otherwise of continuing the project, and secondly, how might such continuation be funded if considered desirable?
- 9 The answer to the first question is currently clear to all parties. The SBM has had a major impact on administrative efficiency and capacity within the Cluster, particularly considering most schools have only one secretary, some of which are part time, to support the school's administration.
- 10 Impacts include:
 - The cross Cluster work of the SBM has been central in helping to create an ethos out of which the formation of the EfB Trust has been made possible.
 - Negotiation and monitoring of joint grounds maintenance contracts. Savings - £1,500 pa Cluster-wide.
 - Current negotiations of joint cleaning contracts. Likely savings - £4,000 pa (estimated).
 - Photocopier contract savings - £2,800 pa.
 - Expert financial advice provided by the SBM has removed the need for schools to subscribe to the enhanced LA Finance Department SLA. Saving - £2,000 this year across the Cluster with a potential of £3,000 per year thereafter. Not all the schools within the Cluster feel the need for the same level of support. One school, for example, currently considers that its Enhanced SLA with the LA finance department is adequate support for it to ensure financial probity.
 - Completion of / readiness for FMSIS in five primary schools. Time saving to HTs has been significant. The sixth primary school had already completed the process before

the appointment of the SBM. For the HT of St Peter's, for example, time saving has amounted to approximately 100 hours. This saved time has been focused on teaching and learning. Additionally, the HT states that it would have been necessary to appoint an external consultant to provide the expertise that was made available by the SBM. Approximate total time savings to Cluster HTs – 450 hours.

- Presentation to parents to explain pupil access grant applications; this would otherwise would have been a senior management task. Expert support for parents throughout the process. Time savings to school administrators and senior leadership – 50 hours minimum.
- Completion of administration and support for parents and providers throughout the Cluster in submission of *Make it Happen* funding paperwork. Time savings to school administrators and senior leadership – 60 hours to date and a potential of 150–200 hours in total up to August 2011.
- The SBM has produced a consistent approach / policy to Performance Management for administrators and support staff across the Cluster resulting in an increase in the skill base of staff and improving value for money through staff performance.
- The SBM carried out Performance Management of administrators at St Peters' as a trial project. It was judged highly effective by the HT with benefits in terms of consistency of expectations and value for money.
- The SBM has organised and contributed to Clerk to the Governors training, offers advice and attends Governor meetings, ensuring compliance with current legislation and increasing the skill base of clerks. Time savings – 48 hours over the Cluster.
- Budget monitoring compliance with audit requirements, knowledge of budget trends, identification and resolution of errors. Time savings - 144 hours over Cluster.
- The SBM has given a lead on Safeguarding across the Cluster including the production of a Cluster-wide Safeguarding advice leaflet for visitors and voluntary workers. As a pilot, with a view to the possible inclusion in any prospective SLA, the SBM has carried out an audit of Safeguarding at St Peters' School. Time savings – 60 hours to date.
- The SBM conducts training and support for Cluster administrators half-termly to share good practice and update them on current expectations.
- The SBM conducted a needs analysis relating to after-school care across the Cluster and then negotiated with potential facilitators resulting in the establishment of a central after-school and holiday provision for the Cluster.

11 How might the project be funded into the future? Again certain key considerations must be weighed:

- Particularly in the current climate, a rigorous appraisal of the needs and cost effectiveness of the post must be conducted. The broad brush strokes alluded to above need to be firmed into clear, costed analyses.
- A central debate is that of primary HTs' time. They will always do their best to fulfil obligations and expectations but it may be argued that the SBM has provided a higher and more specialised level of expertise to discharge these duties.
- QEHC has a strong administration team, but it is working near capacity. Any new funding structure should include identified needs faced within the overall QEHC

structure and not just the Cluster primaries.

- For these reasons, the initial proposal on long-term funding is that of an SLA model. Such a model might mean, for instance, that the SBM has a core function which all schools in the Cluster will identify, cost and buy into. There would then be a series of additional options, each with its own cost formula. For example, preparing and monitoring the *Make it Happen* funding (assuming it continues beyond this financial year) could be offered at a per pupil rate.

Community Impact

- 12 This project has been considered from its inception as a joint SBM / ESCo focus. As noted above, the role of the SBM has been Cluster-wide and community focused.

Financial Implications

- 13 See financial discussions above, 4.

Legal Implications

- 14 None currently identified.

Risk Management

- 15 Consultation / needs analysis as to the nature of the SLA is crucial to secure financial sustainability for the SBM function.

Consultees

- 16 Consultees include: Heads and Chairs of the seven EfB schools.

Appendices

- 17 None

Background Papers

- 18 None

CLASSIFICATION: Open

Wards Affected

County-wide.

Purpose

The purpose of this report is to inform Schools Forum of the effectiveness and impact on the school business management pilot programme has had within the Wigmore Cluster.

Introduction and Background

- 1 The School Business Manager (SBM) Project was a nationally supported initiative brokered by the National College for School Leadership. The remit of the National College was to investigate efficiencies and new ways of working which supported the system redesign agenda. The national view being that the way schools work in certain locations was not sustainable and the application of an education business model would “ease” both financial and bureaucratic burdens. This has proved to be the case and we are now beginning to see changes in educational organisation across all areas of the country.
- 2 There was an invitation sent out to all schools in Herefordshire to offer being part of the rural schools SBM project. Two clusters responded and their cases were heard by Local Authority Officers and National College Coordinators. Both cases had merits and offered different models for rural areas.
- 3 These are sustainable projects if organised correctly. They will provide time efficiency and cost saving beyond the length of the reported project (two years).

Key Considerations

- 4 The overall aim of this project was to create systems and models of practice which would place the operation of primary schools on a more business-like foundation. This may be with a hub and spoke model based around cluster working centralised at a High School or a more “flat” model with shared expertise and experiences to distribute more effectively any responsibilities. Such a move would increase the efficiency and cost effectiveness of the schools. This overall aim led us to consider the following:
 - To identify training needs and “up-skill” administrators in all primaries
 - To investigate job descriptions which reflect position and status
 - To reinforce the roles and responsibilities of SBM
 - To identify savings and VFM through joint purchasing and contracts
 - To identify joint funding projects
 - To educate Governors on the increasing burden of school business management

- To educate Governors regarding their statutory responsibilities
- To qualify all schools against FMSIS
- To audit areas of procurement including
 - Grounds Maintenance
 - Printing and photocopying
 - First aid training – collaborative approach
 - PAT testing
 - Insurance
 - Service Level Agreements including Library Service
 - To release Head teachers more to concentrate on Quality Assurance, Teaching and Learning and Strategy

5 Achievements to date:

- Providing CPD across the cluster including training in risk assessment, child protection, health and safety, ensuring all schools have at least CSBM qualified staff. One school administrator has now taken responsibility for health and safety at the school advising governors on issues. 4 school administrators have attended the SBM National Conference to learn and develop thus further improving standards
- Collaborative training for caretaking and cleaning staff throughout cluster has been provided
- Collaboration has enabled economies in certain spending areas, for example through joint procurement has led to one grounds maintenance contract for 6 schools instead of 6 individual contracts – savings of £3,000 + addressing carbon foot-printing; cluster PAT testing programme savings of 10p per item
- Audit of printing and photocopying has led to a new approach resulting in less waste, more efficient and effective service. 6 months into the new contract has ensured savings of £4,600 compared to the same 6 months last year
- 4 primary schools have invested in new software for financial record keeping giving a more efficient, accurate service
- Highlighted need to update the Herefordshire Library Service funding mechanism which is now on Schools Forum agenda for consideration
- Stronger working relationships between cluster schools, for example cross phase teaching in some subject areas e.g. music, ICT, MFL leading to access to wider opportunities for pupils offering more innovation and flexibility
- Taking a more strategic role in School Business Management, particularly in areas such as finance and health and safety, therefore allowing time saving for teaching staff, particularly Head Teachers to concentrate on teaching and learning. The funding has enabled primary schools to have additional administrative support allowing administrators to have a more focused approach to SBM.

- Expertise across the schools in specific areas, for example FMSIS (financial management standards in schools). HR, Health and Safety, Risk Assessment
- Commitment across all schools to continue to collaborate and they are prepared to do things differently, improving efforts to achieve best value for money
- Cluster First Aid training

6 Effects of Collaboration:

- Team building through greater trust and established common goals of cluster schools
- Sharing expertise, best practice and cutting out duplication
- Stronger negotiating power to secure better value for money
- Training together and each other
- Regular meetings giving the opportunity to spend time developing and streamlining systems and policies therefore less isolation
- The beneficial effect on school finances has led to resources being freed to enable further development of improved learning opportunities for children
- Building on strong cluster links, a second layer of strategy through the business model releases time and saves money in both Head teacher costs and resource use
- Estimated Head teacher time savings over the two year period across seven schools is approximately 1100 hours (@ £46 /hour incl. on costs = £50,600 based on 2 -4 hours per week time saving)

Appendices

7 None

Background Papers

8 None