

ISBL update, our work and relevant sector developments (July 2021)

This is the latest in a series of promised quarterly updates. Please feel free to share this information with colleagues and networks. We also welcome requests for further information on any of our work.

As we approach the end of another challenging academic year, we are at least able to look ahead with renewed optimism. We think we can reflect back on the last 18 months with great pride. Throughout the pandemic, we have been able to ensure service continuity, we have maintained our membership levels, we have successfully delivered high-quality virtual events, and we have recently been awarded two significant government contracts.

However, this is no time for complacency; beyond the pandemic, technology is likely to play a significant role in serving the profession. We must keep pace. ISBL is working with partner organisations to improve our tech capability to ensure the SBP community can continue to access high-quality content and training remotely.

What follows is a summary of ISBL activity since the last update in March.

1 GOVERNMENT CONTRACTS

We are pleased to announce that we have been successful in bidding for two important government contracts:

- Supply of School Resource Management Advisers
- Chief Finance Officer (CFO) Mentoring Pilot

We will now be the country's biggest SRMA supplier (150), and we have won the contract to run a CFO mentoring pilot involving 50 mentors and 50 mentees. Details of the pilot will be published shortly, but we are delighted to be able to lead on this sector-led self-improvement initiative.

2 SUPPORTING THE WORK OF THE NEW SCHOOL RESOURCE MANAGEMENT DIVISION

At the start of the year, the Department for Education established a new School Resource Management Division headed up by Tanya Arkle (Deputy Director), who reports directly to Baroness Berridge (Parliamentary Under Secretary of State for the School System).

Their work spans SRMAs, SRM-related tools and resources, the work of the commercial team and the SBP networks.

We are working closely with this division to help the sector improve its overall approach to resource management, which is the central theme in our [blueprint](#).

2.1 Update from the SRM division, Department for Education

In the March update, we shared information about the Education, Skills and Funding Agency School Resource Management (SRM) programme. This month we wanted to provide you with a short update on some of the tools and resources in the Programme as well as a few recent developments. We are working with ISBL and many others to make sure that our services continue to meet your evolving needs and help you to use every penny of your funding efficiently and effectively. Highlights over the last few months include:

- Nearly 4000 people registered for the last rounds of ICFP training. These sessions were designed for you as school business leaders, but were also open to governors, heads and teachers. We have

had great feedback from those who attended and will be considering how to build on the success of these training courses in the future.

- The View My Financial Insights tool is now available to Local Authorities and maintained schools, helping schools to make data-driven decisions, evaluating their spend in key areas against peers. Meanwhile the Financial Benchmarking Service has improved the comparison functionality for special schools and federations. Both tools have been updated to include the 2019-20 academy data.
- We continue to encourage any schools who would benefit from some free bespoke support to take up the offer of a School Resource Management Adviser who can bring external expertise to help identify opportunities to save and redistribute funding. We have awarded new contracts to ISBL, North Yorkshire County Council and Education Performance Improvement Ltd enabling us to deliver this service for another three years, along with a pilot mentoring programme for CFOs.
- We are proud of what we have achieved since the launch of the 'schools' buying strategy' three years ago. Since 2017, our efforts have helped schools save an estimated £425m as of April 2020 to spend in other ways in their schools, while the Risk Protection Arrangement (RPA) has offered an alternative to insurance schemes for schools.
- 80% of state-funded schools in England are now signed up to Teaching Vacancies and have listed over 50,000 jobs for free.
- We are pleased that almost 7,000 schools and colleges across the country have applied to our Digital Education Platforms programme since the start of the pandemic. This programme has now been extended to March 2022 and funding is also available for all state-funded schools and colleges to get set up on either a Google or Microsoft platform. Senior leadership teams can get free peer-to-peer support on how they can use technology to reduce workload, increase efficiency and support catch-up in their school from the EdTech Demonstrator Network until March 2022. You can find out more at remaining upcoming regional launch events joined by the RSC for your region.

This programme is designed to help make sure your funding is directed to achieving the best educational outcomes for your children. We are working in partnership with you and will continue to listen to how we can continue to support you. More information about the tools and frameworks on offer can be found via the School Resource Management collection [gov.uk page](#).

3 SCHOOLMARK

As part of a package of tools and resources (including our new [Financial Planning and Resource Management Hub](#) – see item 12), SchoolMark has been created to help schools and trusts reflect on their current approach to resource management and financial governance. It aims to provide confidence to key stakeholders and the regulators (ESFA/DfE) in a school's or trust's competency, capacity and compliance in relation to all finance and resource allocation matters.

A group of six multi-academy trusts will be participating in a SchoolMark pilot to commence this month.

We aim to launch the full SchoolMark accreditation scheme in September.

You can find out more and register your interest at www.SchoolMark.org.

Additionally, we have partnered with Hub4Leaders so that schools and trusts can use their due diligence tool [Evaluate-Ed](#) to collect and submit evidence to support the SchoolMark accreditation process.

4 EQUALITY, DIVERSITY AND INCLUSION ROUND TABLE

Following a year of hosting a sector leaders' focus group, we agreed with other participants that it would be timely to commemorate George Floyd's tragic death with an event that drew on our research and the work being undertaken by sector bodies and trusts within our system. The round table was chaired by Professor Paul Miller and started with four moving accounts from three Black SBPs and one Black head teacher. This was followed by a brief summary of work being carried out by three trusts and all the sector bodies in attendance.

The full round-table discussion is available [here](#).

We have simultaneously published a [statement of action and commitments](#) signed by all the sector bodies in attendance as well as other committed stakeholders

Additionally, ISBL and six other sector leaders have written a [joint letter to the Permanent Secretary](#).

5 GOVERNMENT CONSULTATIONS

We continue to engage with DfE on a number of key issues. In most cases, our interactions involve other key stakeholders and sector bodies, but on occasions, we are called to private meetings, and indeed we sometimes feel we have issues we need to bring to the direct attention of ministers.

We are involved in ongoing (live) consultations in these following broad areas:

- Funding – next phase of the NFF – we are approaching a critical phase of the hard formula consultation, and ISBL will be helping the SBP community navigate their way through the complexities of the consultation forms
- Assurance – we are involved in multiple strands including our role on the Financial Reporting Programme Board, Better Financial Reporting, and our ongoing participation in both the assurance working and steering groups that preside over the reporting framework, the Academy Trust Handbook (Academies Financial Handbook) and the Accounts Direction
- COVID response – we continue to participate in ongoing discussions with senior officials and ministers in response to the fluid nature of the pandemic; we help inform the thinking on the necessary measures required to mitigate risks while attempting to ensure education provision continuity

6 EVENTS

We are pleased to have successfully seen the return to LIVE regional events with the delivery of conferences in Taunton (30 June) and Portsmouth (8 July). The events were delivered to meet the remaining restrictions in place and meet COVID-secure measures. The feedback from delegates and exhibitors was very positive, with comments including:

“The talk by Forbes was hugely relevant professionally and personally and has resulted in my line manager offering me flexibility to work from home for part of the week. The ladies were amazing and offered me any support required on the day as this was my first outing after shielding!”

“I found it so useful to take some ‘time out’ to really help with planning for our trust and to network and share best practices.”

We are also seeing encouraging early signs of interest in our showcase National Conference taking place in November (11–12), with an unprecedented number of bookings already having been confirmed. This event will be delivered as a hybrid to allow both in-person attendance and virtual access, recognising that for some colleagues, attendance in person is not practical given the size or location of their school.

7 MARTIN LEWIS AND APPLE LEADER AT NATIONAL CONFERENCE

Following an introduction by Baroness Berridge and a subsequent meeting between ISBL’s CEO and Martin Lewis, we have been able to secure the Money Saving Expert to open our National Conference.

We are also excited to announce that one of Apple’s senior executives (TBA) will address our conference on the subject of change.

8 END-POINT ASSESSMENT ORGANISATION

ISBL has been registered as end-point assessment organisation for over 12 months and has been successfully delivering end-point assessment over this period despite the pandemic, having moved to

virtual assessment methods. We are achieving our target of assessing up to 50 school business professional apprentices each year. This is a key activity for ISBL as we want to ensure entry routes to the profession and oversee the level of practice of these future professionals.

9 BLUEPRINT

Last term, we published a [blueprint for school business leadership practice](#). The document has been well received by the sector. This document underpins everything we do as an institute but is also designed to guide the sector in developing high-performing SBPs and planning for the future through the creation of a succession/talent pipeline.

The blueprint also makes it clear what we are and what we are not.

It is also the anchor point for ISBL's overarching strategy.

10 SECTOR ENGAGEMENT

Throughout the pandemic, we have had regular calls with trusted partners, stakeholders and practitioners.

These meetings still continue and include the following:

- Regional leaders/chairs
- Advisory Panel
- International education leaders and SBPs
- Diversity focus group – all sector bodies
- Sector leaders – invited group including CST, Ambition, Teach First, Education Endowment Foundation, The Chartered College of Teaching and ISBL

11 FELLOW FORUM

The Fellow Forum, which was developed through a dedicated group of ISBL Fellows wishing to facilitate regular dialogue across this group of leading practitioners and supported by the ISBL executive team, continues to grow. There have now been four meetings since its launch in January 2021, and each meeting has seen a minimum attendance of 50 Fellows who are all sharing and developing good practice. This insight is feeding into the work of ISBL and the development of materials on the Good Practice Library, Finance and Resource Management Hub and Fellow blogs.

Additionally, Fellows will be supporting the development of a webinar to be made available at the end of the summer on the NFF (core) consultation to ensure that SBPs across the country can engage in the consultation and offer their own informed response.

12 NEW FINANCE AND RESOURCE MANAGEMENT HUB

Last term, we launched our new [Finance and Resource Management Hub](#). We hope you find this one-stop point of reference helpful. We are keen to build the content with more case studies and accounts from the front line, so if you have anything you'd like to share, please [let us know](#).

13 COMING SOON: RECRUITMENT HUB (NEW FOR AUTUMN 2021)

We are currently working with a partner organisation to develop a full recruitment service. The service will match candidates with new opportunities, it will provide prospective employers with SBP candidate profiles, and our platinum service will support schools and trusts through the search, shortlist and interview process.

14 OUR QUALIFICATIONS PORTFOLIO

View our [Professional Development Guide](#) for more information on what qualifications are available.

	Aspiring	General SBP	HR Specialist	LLS Specialist	Finance Specialist	Procurement Specialist
National	Level 2 Accounts / Finance Assistant Apprenticeship	Level 4 School Business Professional Apprenticeship				
	Level 3 Business Administrator Apprenticeship	Level 4 School Business Professional Apprenticeship (SBPA)				
	Level 3 HR Support Apprenticeship	Level 6 Chartered Manager Degree Apprenticeship (CMDA)				
	Level 3 Assistant Accountant Apprenticeship	Level 7 Senior Leadership (Degree) Apprenticeship				
	Level 3 Payroll Administrator Apprenticeship	Level 4 ILM Diploma for School Business Managers (formerly CSBM)				
	Level 3 Procurement and supply assistant Apprenticeship	Level 5 ILM Diploma for School Business Leaders (formerly DSBM)				
	School Administration Foundation Certificate (SAFC)	Level 6 Advanced Diploma for School Business Managers (ADSBM)				
	ISBL-offered qualifications	n/a	Certificate in Strategic Educational Leadership	CIPD Level 5 Associate Diploma in People Management for School Business Professionals	APM Level 4 Project Management Qualification	CIPFA Diploma in School Financial and Operational Leadership
Notes	<i>The national qualifications listed here are those that aspiring SBPs may complete in a school context.</i>		<i>There are a wide range of professional qualifications and apprenticeships in these areas at a variety of levels that are not listed here.</i>			

15 HR UPDATE FROM STONE KING

Stone King has produced a [briefing note on how schools can minimise legal risks and challenges arising out of Summer 2021 Qualifications Series](#).

16 UPDATE FROM SCHOOLS COMMERCIAL TEAM, DEPARTMENT FOR EDUCATION

Since the last update we have:

Launched our new [Schools Buying Programme: Prospectus 2020-2025](#)

The schools buying programme is for:

- all financial and administration staff in schools
- headteachers and other school leaders
- academy trusts and school governing boards.

This programme builds on and develops the ambitions set out in schools' buying strategy published in 2017.

The schools buying programme aims to:

- help schools get value for money on their non-staff spend
- focuses on complex procurement
- sets out the DfE's approach for the next 5 years.

We have also consulted on proposals for the new [Get Help Buying for Schools Service](#) and published the consultation feedback. DfE hope to begin to roll out the service from Autumn 2021.

We now have over 45 DfE [recommended frameworks](#) listed on GOV.UK to assist you with buying goods and services for your school or MAT.

Some of our most recent recommended frameworks include:

[Outsourced HR and Payroll](#)

[Transport](#)

[Staff Absence Cover](#)

[Utility supplies and services](#)

The Schools Commercial team have been busy running webinars alongside our suppliers over the last few months. The sessions explain more about how to use our approved frameworks and how they could help schools achieve value for money. The webinars provide useful information and the opportunity to ask questions. To date, over 1600 school business professionals have attended at least one of the sessions. Please look out for more webinars next term in the ISBL weekly bulletin or ESFA updates.

17 UPDATE FROM BETTER FINANCIAL REPORTING TEAM, DEPARTMENT FOR EDUCATION

17.1 Automation

The Better Financial Reporting (BFR) team has successfully completed the public beta phase now and are busy integrating another four suppliers for this year's Accounts Return (AR). There have been a number of webinars going through the solution, and many of the suppliers that are integrating this year are also holding meetings with their customers. The solution is working as expected, and for those that have been using it, it has saved time in completing the AR. In addition, there is a plan for a small-scale trial of producing draft financial statements for trusts following data submission through the API.

The rollout of the Chart of Accounts (CoA) is going well, with recent feedback from adopters being very positive. The BFR team continue to work with all the major suppliers on embedding CoA into their products. The vast majority of the sector should have CoA available by this year's AR alongside the API. Arrangements for adopting would need to be discussed with individual suppliers.

17.2 View My Financial Insights

The latest update to VMFI was launched just before Easter. This was a major release as VMFI has now been extended to local authorities and their maintained schools. Local authorities are able to see an oversight of all of their schools in a single place and able to drill down into individual school analysis. In addition to this, VMFI is now populated with both 2018/19 and 2019/20 year-end data for academies and maintained schools, with the dashboards updated to show the historical trends in the data over those two years. For maintained schools, the DfE has recognised that most have a DfE Sign-In (DSI) account, so they have built functionality into VMFI that enables schools to use their existing DSI account to access VMFI.

The BFR team continues to hold free VMFI webinars for users, which are still proving popular. Dates for these will be promoted through the ESFA Update and will continue in the next academic year.