

## **Alison Moon, School Business Manager and Company Secretary - Warden House Trust**

In Feb 2010 I took up the term-time only role of Finance Officer at Warden House Primary School in Deal, Kent; at this time a Local Authority school graded 'Requires Improvement' and under new headship. Having an international corporate background and subsequently moving to an office management position within my family's construction company following a break to start a family; this was my first role within the education sector. I came to the role with a degree in Administrative Management and whilst this was not a requirement for the role at the time, upon reflection I can see how it became invaluable later on as it gave me an excellent grounding in how to manage business and office functions. Without this research-based educational background I may not have had the skills to cope with what was to come.

The next sections show the work I have been leading on since I came into the education sector, how I moved from the Finance Officer post into a SBM role, and more recently how I have used NASBM Professional Standards for self-assessment and developing the school support service. My work on these areas also formed the narrative, and with documentary evidence, supported my NASBM Fellowship application.

### **Key milestones and projects during my time at Warden House**

#### Academy conversion process – 2012

I was involved in the consultation process and took the lead on legal and administration involved with the process. I had no specific training prior to embarking on this process; it was very much a learn-as-you-go process relying on networking with contemporaries who had already gone through the process along with sector professionals including legal, HR and payroll.

#### Role of Business Manager - 2013

I negotiated a new 52-week contract in 2013 to incorporate elements pictured below in Figure 1. My role has changed since to incorporate additional elements, though the diagram provides good pictorial evidence of my role and the overall complexity of the School Business Manager role. I first presented my case to the Principal and Governors and it was rejected by the LGB who thought that the changes in my role would be a temporary situation. I felt that with the additional responsibilities and tasks associated with academy life that this was unlikely and I requested that they reconsider. I put together a business paper detailing the hours that I was consistently working (which at the time was more than a full time role), my areas of responsibility (having moved away from the supported Local Authority system) and researched vacancies at other schools for similar positions for benchmarking purposes. Once this was presented and discussed further the LGB were fully supportive of the new contract.

#### Joining the Senior Leadership Team (2013)

This emerged through discussion with the Principal. I expressed to him that I felt I was providing support to the school which was leading and significantly impacting the support service provision. I had researched and negotiated a new HR & Payroll contract for example. I had proven myself as an effective negotiator rather than simply renewing longstanding contracts that had been in place as an

historical circumstance. I had also taken a lead on some significant building projects at the school, all freeing up the time of the Principal and Deputy.

#### Researched and introduced Performance Management tool – 2014

I was tasked with researching the market for online support tools to manage the incoming requirement for teacher performance management. Keeping abreast of changes to support staff pay and conditions, we quickly established that this would be something that would be helpful in identifying training needs and a consistent approach to the appraisal cycle. As part of my own experience using the chosen system, and as identified in the point below, I identified the need for me to study at Masters level. I felt that the trustees needed to be able to evidence that they had the right personnel in leadership roles and I embarked on the MBA Educational Leadership and Management course offered by Anglia Ruskin University which started in September 2014.

#### Research into Trusts and the role of Company Secretary - 2015

As part of my leadership role and ensuring the legal and financial sustainability of our academy, I carried out a significant body of research into trusts (this will be added to the NASBM Research Repository later in 2016). This work led to our exit from our original sponsor trust (September 2015) which had since been placed in special measures following a contentious merger of two local secondary schools. As an academy graded as 'Outstanding' (an improvement of two grades) we were able to negotiate with the DfE to form a new trust and the role of Company Secretary was added to my remit. Research through my MBA course assisted greatly with moving trusts, having studied elements including Strategic Management, Change Management and Systems Management, and then also using specific examples relating to our academy situation for my coursework. The overall turn of events was totally unforeseen and had led to an unexpected body of research and legal work – this vastly developed my expertise in the legal operation of trusts and we will develop a much stronger entity as a result. It really tested our ability to be resilient and taking the Professional Standards into account it required expertise in all of the behaviour categories.

#### Lead on Growth Development Strategy

Again my MBA studies allowed me to incorporate personal experience and my assignment on Strategic Management was based around this – it included a document which was presented to the trustees. I had worked closely with the Principal on strategy and the document followed our research, gave recommendations, options appraisal (of different types of structure and size) as well as an implementation plan and evaluation & monitoring strategy. This enabled the trustees to grasp some of the more complex issues in an easily accessible format. I feel it also allowed them to see the depth of research that had been undertaken giving real credence and trust in the work undertaken by the principal and myself.

#### **Using the Professional Standards for self-assessment and developing the school support service**

Earlier this year (2016), I utilised the NASBM Professional Standards to carry out a self-assessment. My Principal and I agreed that I was consistently operating at Tier 4, having led on various projects,



strategies, reviews and negotiations over the long term. This also gave me the confidence to submit my NASBM Fellowship application which was successful earlier this year.

My MBA studies really gave me the confidence to rate myself at the highest level as I knew I had carried out various reviews of my own abilities and practices in a range of areas, and I had also put forward recommendations and strategies for change and implementation plans; essentially where I was really taking the lead in order to direct the school in its future improvement.

It is sometimes difficult to carry out a review of yourself; I find it a challenge to mark myself as an expert in anything as there is always more to learn. Equally, without assessing yourself to be an expert you run the risk of not being taken seriously as a leader. The Professional Standards list the Functions and Behaviours across four tiers (levels of working) and if you mark these as honestly as possible, any areas for development are clear.

My experience of School Business Management professionals working at Tier 4 are that even when considered expert the learning continues. The behaviours exhibited naturally result in continued knowledge with on-going collaboration and seeking out of best practice through contact links and networking channels with sector experts. I have found that the better we become, the more there is to learn. One of the performance management objectives set a couple of years ago for members of SLT was based on social networking and blogging which at the time seemed bizarre but now forms part of our daily lives and keeps our knowledge current. It really does show how things can move on and therefore how we all need to learn to keep growing. I have been grateful to contemporaries offering their time to share their experiences and I am now being asked more and more to share my own, and as an educational organisation it seems fitting to pass on our learned lessons.

As an establishment there has been a definite shift from being a setting where we do what we have always done (legacy behavior), to a setting where staff generally are striving for the best for our pupils; in doing this there have been a surprising number of unexpected personal improvement journeys for staff.

I am now developing our school support service in line with NASBM Professional Standards. My changing role has led to the need for a Finance Assistant and with other changes to staffing I will be taking on the line management of office staff. I am currently devising training using the standards. All processes now take consideration of how these will fit within the wider trust not just at school level. I am in the process of researching and trialing various systems including accountancy packages, e-procurement links and banking services (online payments) with a view to incorporating financial efficiencies that would be achievable as the trust grows in size.

I am also currently compiling my final piece of work for my MBA which is a major project based on centralisation in MATs and I am looking forward to the challenges ahead as we begin to grow the Warden House Trust. I am already turning my thoughts to what I might do when I have finished my MBA – perhaps a specific finance accreditation or even a doctorate – who knows!



Figure 1: Changing role of the SBM