

Application to become a ISBL Fellow

Checklist - prior to completing this application

Ensure you:

- have read the ISBL Fellowship guidance. The guidance sets out our eligibility criteria and requirements for Fellowship, writing style tips and evidence to include.
- contact the ISBL office if you need support (email fellowship@isbl.org.uk)

Section 1: Personal details

| | | | |
|--|--|------------------|---|
| Title | Mr Mrs Miss Ms Other <i>(Please circle the relevant title)</i> | | |
| Surname | | Forenames | |
| Job title | | | |
| Email address | Work/home <i>(Please circle)</i> | Telephone number | Mobile/school/home <i>(Please circle)</i> |
| Employer's name and address | | | |
| Your workplace if different from your employer's address | As above | | |

Are you an existing member of ISBL? *Please TICK all that apply.*

| | | | | | | | |
|-----|--|----|--|-----------------------------|--|---------------------------------------|--|
| Yes | | No | | I used to be a NASBM member | | I have never been a NASBM/ISBL member | |
|-----|--|----|--|-----------------------------|--|---------------------------------------|--|

Requirement 1 – experience

Supporting statement

Please explain here how you meet Requirement 1 (see the brief information below plus the ISBL Fellowship guidance)

Briefly describe your overall experience here in no more than 250 words. Please list your SBP roles with some brief wording around this to support this section.

My first role in education was as the Administrator at a very small school (approx. 40 NOR), beginning in January 2003. I soon realised I enjoyed the role greatly, particularly the variety within it and the sense of purpose it gave me and enrolled onto the then fairly new CSBM course. After gaining CSBM I was eager to progress to a more senior role and began looking for School Business Manager roles. I was successful in gaining such a role at (school and date started redacted).

After having worked at (school name redacted) for several years, an opportunity arose to apply for the Business Manager post at a neighbouring school, (school name redacted). Though the job titles were identical, it was clear from the role profile and accompanying salary that this was a more challenging role with higher accountability, which appealed to me as I felt that opportunities for further personal and professional development at (school name redacted) were limited at that time. I was successful in gaining the position at (school name redacted) and began working there in (date redacted). From the start, I have been a member of the Senior Leadership Team (school name redacted).

Supporting evidence checklist and declaration

Ensure you:

- submit your CV and current job description
- list all your supporting evidence for this section in the box below (we suggest that you number each piece of evidence).

1.1 Current job description

1.2 CV

Requirements 2 and 3 – qualifications, experience and impact

Supporting statement

Please explain here how you meet Requirements 2 and 3 (see the brief information below plus the ISBL Fellowship guidance)

Requirement 2: Qualifications, training and CPD – please retain this sub-title
List your qualifications, training and CPD here (for the last 3 years)

As a participant:

Development for Chairs Programme – NGA, July 2019
Education Law Conference – Browne Jacobson, June 2019
Education Forum – Forbes Solicitors, May 2019
Managing Safely – IOSH, October 2018
Data Protection Officer training – (organisation name redacted)/Browne Jacobson, July 2018
Educational Visits Co-ordinator update – LA/council name redacted, June 2018
(Organisation name redacted) Conference – organisation name redacted, May 2018
(Organisation name redacted) Conference – organisation name redacted, March 2018
EdExec Live North – EdExec, February 2018
GDPR Conference – Optimus, January 2018
(Organisation name redacted) Conference – organisation name redacted, October 2017
Safer Recruitment – LA/council name redacted, February 2017
National Professional Qualification for Senior Leadership – NCTL, January 2017

As a contributor:

(Town name redacted) SBLs Conference, (date redacted)
SBL Conference – (organisation name redacted), (date redacted)
(Organisation name redacted) Conference, (date redacted)

Requirement 3: Experience and impact

Choose two disciplines from the ISBL Professional Standards and **one must be Leading Support Services** and tell us in 500 words (we suggest around 250 words per discipline) your experience and impact in these areas and provide evidence of this.

Leading Support Services

As per my enclosed job description, I am responsible for Health & Safety management within the school. This includes updating, cascading and monitoring relevant policies (ref. 3.1 and 3.2). I also take the lead on behalf of the school during H&S external audits, the most recent being in January 2018. The report from this audit states "It was very apparent during the audit & inspection that (applicant's name redacted) leads the Health and Safety culture within the school to a very high standard." (ref. 3.3, page 2)

I am also responsible for developing and reviewing many other school policies including Complaints, Acceptable Use, Data Protection, Gifts & Hospitality, Staff Induction, Staff Code of Conduct. (ref. 3.4 – 3.9). When writing policies, I always have due regard to relevant legislation, statutory / best practice guidance and advice from sector experts. Once these policies are approved I will either lead on implementing them myself or ensure that another appropriate staff member does so.

In 2018, I was part of a working party with the DfE tasked with reviewing their statutory guidance for maintained schools on dealing with complaints.

Some policies are written in direct response to evolving concerns and issues that arise, for example our Gifts & Hospitality Policy. In 2016, I heard a conversation between some members of staff regarding a third party linked to the school who had given them a monetary gift. I discussed this with the staff involved and they registered discomfort with the situation. Following this, I contacted our legal advisers and discussed my concerns with

them, then presented both the concerns and the legal advice to our Headteacher who asked me to draft a policy accordingly. After the policy had been approved by the Head, I led a section of a staff meeting to introduce the new policy and answer any questions that staff had.

Finance

I take the lead on financial management at the school including preparing annual budgets and 3 year forecasts and presenting these to the Governing Board; budget monitoring; preparing internal regulations and procedures for governors' approval, and ensuring that these are followed by staff (ref. 3.10 – 3.13); generating additional income through lettings, grants, etc. I regularly review the school's Charging & Remissions Policy (ref. 3.14) and ensure that this is followed by staff.

When presenting draft budgets and monitoring reports to the Governing Board, I include explanatory notes to assist their understanding, such as the document enclosed which accompanied this year's draft budget plan (ref. 3.15)

I also give training and support to governors when required, to further assist them in building their knowledge and understanding of school finances, for example the "informal Q&A session" in September 2018 which is noted in the enclosed minutes (ref. 3.16, page 2).

I give input in teaching staff meetings at regular intervals with regard to financial policies and procedures, interspersed with email memos and reminders such as the two enclosed (ref. 3.17 and 3.18).

Requirement 4 – commitment to CPD and impact

Supporting statement

Please explain here how you meet Requirement 4 (see the brief information below plus the ISBL Fellowship guidance)

How my qualifications, training and CPD show my ongoing commitment to CPD and the impact of this – please retain this sub-title

Tell us in 500 words how your qualifications, training and CPD show your ongoing commitment to CPD and the impact of this CPD.

As outlined in the section above, I have attended a variety of training opportunities as a participant over the last 3 years. I believe it is vital to keep up to date with current policy and practice, as well as taking the time to network with colleagues and share ideas. Ours can be a lonely role, so it is especially important to stay connected to like-minded colleagues. I also subscribe to a range of email updates such as Gov.uk, EdExec, Schools Improvement.net, Browne Jacobson, Forbes Solicitors, ICO, ACAS, CiPD, IOSH in order to keep abreast of what is happening in the wider education world and beyond.

Some of the training I have attended has had a specific focus – for example, Educational Visits Co-ordinator update, Safer Recruitment – and my attendance on this has ensured that I am equipped to undertake my role to the best of my ability, as well as ensuring the ongoing compliance of the school as a whole (see refs 2.2-2.17).

I also chose to undertake the NPQSL (ref. 2.14) which is seen by many as for those from a teaching background, indeed I was the sole SBL in my cohort and only the second SBL that the provider had had as a participant on this qualification. From some of the discussions

that I had with other attendees on this course, it was clear that I was challenging some of their preconceptions – something I was glad to do! I believe it is important to push boundaries and challenge stereotypes when I encounter them.

As a system leader I contribute to the ongoing development of CPD needs for all SBLs as I am the chair of (organisation and their council name redacted) which means that I plan conferences for other SBLs on a national basis, meeting my needs and the training needs of other SBLs (example agenda ref. 5.8). For example, the most recent SBL national conference which I helped to plan had sessions for SBLs (the detail of the sessions has been redacted for confidentiality purposes).

Last year, I also attended SBL conferences in (town names redacted) and (ref. 2.16 and 2.17) where I delivered keynote talks. The event in (town name redacted) was my first of this type and hence I was admittedly very nervous about this, however I decided to incorporate my feelings of nervousness into the presentation. The theme I had been given was 'empowering leaders in challenging times' and I chose to focus on how we as SBLs can empower ourselves, using myself as an example of how doing something that is somewhat out of your comfort zone can increase self-confidence. Feedback from the session was very positive.

Supporting evidence checklist and declaration for requirements 2-4

Ensure you:

- submit a copy of your Level 6 (or above) qualification certificate, other relevant CPD/training course(s) evidence i.e. certificate(s) or letter(s) of achievement (if the training/CPD is not certificated) and your Personal Development Plan

- 2.1 Level 6 qualification certificate (ADSBM)
- 2.2 – 2.17 Evidence of other CPD/training in last 3 years
- 2.18 Personal development plan
- 3.1 Health & Safety Policy
- 3.2 Fire Alarm Activation Procedure
- 3.3 Health & Safety Audit Report, January 2018
- 3.4 Complaints Policy & Procedure
- 3.5 Acceptable Use Policy
- 3.6 Data Protection Policy
- 3.7 Gifts & Hospitality Policy
- 3.8 Staff Induction Policy
- 3.9 Code of Conduct for Staff and Volunteers
- 3.10 Internal Financial Regulations
- 3.11 Internal Financial Procedures
- 3.12 Statement of Roles & Responsibilities for Financial Management
- 3.13 School Fund Procedures
- 3.14 Charging & Remissions Policy
- 3.15 Notes to accompany draft budget 2019-20
- 3.16 Governing Board minutes, July 2018
- 3.17 Email to teacher re. curriculum budgets, January 2019
- 3.18 Email to teacher re. curriculum budgets, May 2019

Requirement 5 – evidence of leadership within your school/trust and system leadership within the school business profession

Supporting evidence checklist and declaration

Please explain how you meet Requirement 5 (see the brief information below plus the ISBL Fellowship guidance)

How my evidence shows my school and system leadership – please retain this sub-title

Tell us in 500 words about your school and system leadership and provide evidence of this.

I have been a member of (organisation and their council's name redacted) since its inception in 2013 and in July 2017 I was elected to be the SBL representative on (organisation committee name redacted). In this role, I now chair the (organisation council's name redacted) and ensure that the SBL perspective is heard at the highest decision-making level within the organisation. (ref. 5.2 and 5.3)

In 2017, I decided that I would like to become a governor at another school, for three key reasons: firstly, that I understand how difficult it can be for many schools to find appropriately skilled governors; secondly, that this would give me the opportunity to have a positive impact on a broader group of children and young people; thirdly, that I believed it would be a good source of professional development. I became a governor at (school and town name redacted), near (town name redacted) in July 2017 and subsequently became chair in December 2017. (School name redacted) had an Ofsted inspection in February 2018 and the inspection report mentions the impact that I was already having as chair (see enclosed 5.4, page 3). I believe this impact has continued to develop, as evidenced in the comments made in the 360 evaluation that I carried out towards the end of the (course name redacted) (ref. 5.5).

Earlier this year, on behalf of (school alliance name redacted), I began to investigate what support and training could be offered to SBLs who schools are part of the alliance. 8 out of a possible 17 SBLs came to an initial scoping meeting with me in July 2019 to discuss ideas. From this I have planned our first network meeting to take place in November 2019 and I am currently in the process of organising a series of education forum meetings run by (name of solicitor's firm redacted) to take place in (town name redacted), which will provide good quality, local CPD for SBLs. I have also spoken (organisation name redacted) CPD group and asked them to look at extending the remit of their senior leadership conference to include SBLs next year. (ref. 5.6, 5.7 and 5.8)

I was also recently invited by the LA to be part of a task and finish group looking at how High Needs funding could be best targeted to support pupils with additional needs in mainstream schools. The work of this group will be fed back to Schools Forum to inform their decision-making for next year's budgets. (ref. 5.9)

I believe that this proves that I am an innovative and leading SBL in my field.

Supporting evidence checklist and declaration for Requirement 5

Ensure you:

- provide evidence of your school and system leadership e.g. minutes of meetings showing your input and impact
- provide us with a reference from your Headteacher/ CEO/ line manager (whoever is most relevant to you in your post) to support your school leadership evidence
- list all supporting evidence accompanying this section of your application form below (we suggest that you number each piece of evidence).

5.1 Reference from Headteacher

- 5.2 NAHT blog post – an introduction to NAHT’s conference on empowering leaders in challenging times <https://www.naht.org.uk/news-and-opinion/news/leadership-news/an-introduction-to-nahts-conference-on-empowering-leaders-in-challenging-times/>
- 5.3 (Organisation name redacted) email to all SBL members, December 2018
- 5.4 Ofsted Report – (School name redacted), February 2018
- 5.5 (Programme/course name redacted) Comments
- 5.6 & 5.7 Emails re (school alliance name redacted) SBL offer
- 5.8 Notes from (school alliance name redacted), SBL meeting July 2019 (names redacted)
- 5.9 Email from LA re. High Needs task and finish group

Section 3: Declaration and Requirement 6

I confirm that the details I have provided are a true representation of my skills, qualifications and experience. I realise that any false statements could lead to the rejection of my application to become a ISBL Fellow.

I confirm that, if my application is successful, I will comply with the ISBL Code of Ethics. I confirm that I have not been disqualified as a trustee or governor nor found complicit in any proven malpractice.

Please delete as appropriate:

My school has not received an ESFA malpractice investigation or a qualified audit report.

Name: *Name redacted*

Date: Redacted

Section 4: Checklist - prior to submission

Before sending in your application form, please check the following:

- Have you completed each section of the application form, referring to the ISBL Fellowship guidance to make sure that you meet our Requirements?
- Have you attached the following evidence with your application form?
 - **A copy of your job description(s)**
 - **Your career summary or CV**
 - **Copies of your Level 6 qualification certificate(s), plus training and CPD**
 - **A Personal Development Plan**
 - **Evidence of school and system leadership**
 - **A reference from your Headteacher/CEO/Line manager**
- Have you numbered all of your evidence pieces in the supporting evidence boxes?
- Have you read and signed in the Declaration and Requirement 6 box above?

Section 5: Submitting your application

Please submit your completed application via post and email:

ISBL, 53 Butts, Coventry, CV1 3BH.

fellowship@isbl.org.uk

Monitoring Equality and Diversity

As part of our monitoring, we wish to collect the following equality and diversity information from anyone applying to become a ISBL Fellow.

We will separate this part of your application from the rest of your application form. The information you give is confidential and will not be seen by anyone involved in the recruitment process. It will not affect our decision on your application.

Please provide details about yourself by ticking the relevant boxes.

Gender

Male Female

Disability. The Disability Discrimination Act defines a disability as 'a physical or mental impairment which has a substantial and long-term adverse effect on the person's ability to carry out normal day-to-day activities.'

Do you consider you have a disability under this definition? Yes No

How would you describe your ethnic background? This allows NASBM to monitor diversity of ethnic backgrounds amongst our members.

White:

| | |
|--------------------------|--------------------------|
| English | <input type="checkbox"/> |
| Welsh | <input type="checkbox"/> |
| Scottish | <input type="checkbox"/> |
| Northern Irish | <input type="checkbox"/> |
| Irish | <input type="checkbox"/> |
| Gypsy or Irish Traveller | <input type="checkbox"/> |
| Other White background | <input type="checkbox"/> |

Asian/ Asian British:

| | |
|----------------------------|--------------------------|
| Indian | <input type="checkbox"/> |
| Bangladeshi | <input type="checkbox"/> |
| Pakistani | <input type="checkbox"/> |
| Chinese | <input type="checkbox"/> |
| Any other Asian background | <input type="checkbox"/> |

Black/ African/ Caribbean/ Black British:

| | |
|---|--------------------------|
| African | <input type="checkbox"/> |
| Caribbean | <input type="checkbox"/> |
| Any other Black/ African/ Caribbean background | <input type="checkbox"/> |

Mixed/ multiple ethnic groups:

| | |
|----------------------------|--------------------------|
| White and Black Caribbean | <input type="checkbox"/> |
| White and Black African | <input type="checkbox"/> |
| White and Asian | <input type="checkbox"/> |
| Any other mixed background | <input type="checkbox"/> |

Any other ethnic group

Prefer not to say

Please say
which

Relationship status

Divorced or my civil partnership has
ended

Single

Married or in a civil partnership

Prefer not to say

Widow or widower

How would you describe your sexual orientation?

Bisexual

Gay man

Gay woman/lesbian

Heterosexual/straight

Prefer not to say

Other

How would you describe your religion and belief?

Buddhist

Christian

Hindu

Jewish

Muslim

Sikh

Other

No religion

Prefer not to say