

Professional Development: Career pathways and development for SBPs

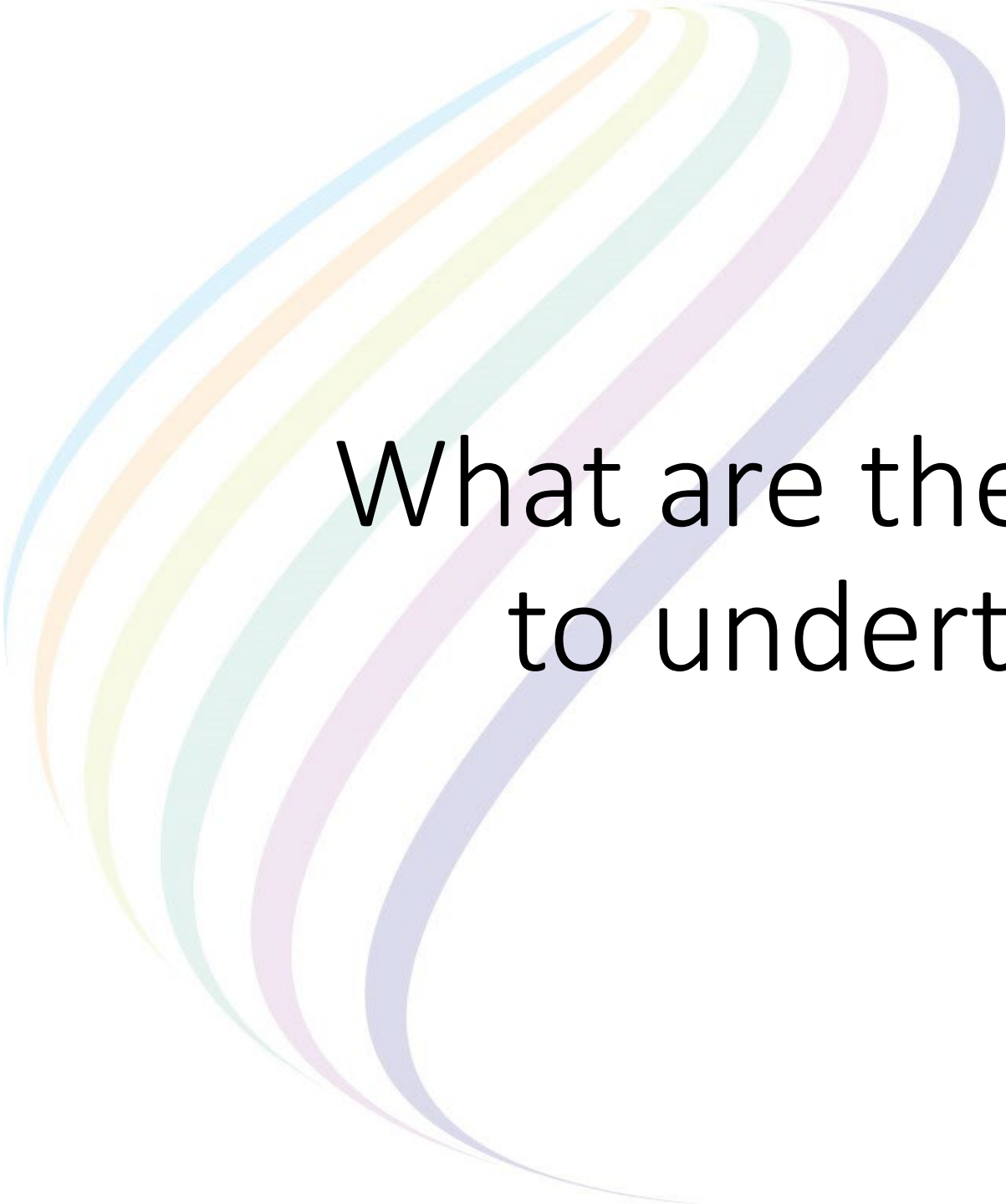


Lee Herridge

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What are the main barriers
to undertaking CPD?

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Time

Cost / budget

Capacity / cover concerns

Distance

Lack of opportunity

Fear / inertia?

Motivation

Lack of employer support

Not a priority now?

Not relevant?

Lack of employer recognition

Lack of appraisal opportunity

Lack of investment in CPD

Not interesting

Size of the team

Continuing Professional Development

"None of us would want to visit a doctor who had done no CPD since qualifying... CPD can help you to perform better in your role and boost your self-confidence, reduce your levels of stress, as well as giving you a competitive edge and potentially more earning potential" (Neary & Johnson, 2016: 17)





Professional Standards



Practitioner level	Role type	Recommended Qualification level
Foundation	Entrants to the profession and those in administrative roles	3
Associate	School or Trust Business Manager	4
Lead	School or Trust Business Leader	5 to 6
Strategic	Executive / Senior Leader (FD, COO, COO, Director)	7

<https://www.isbl.org.uk/isbl-professional-standards>

ISBL Self-Assessment



Institute of School Business Leadership

≡ Operational Leadership

14%

Save Progress

Introduction

The purpose of the **Operational Leadership** discipline self-assessment is to consider your experience of leading operational planning across all school or trust business functions to ensure effective and sustainable resource allocation to maximise outcomes for pupils across the school or trust.

This section is central to all those involved in school or trust operational leadership and should be considered alongside each specialist discipline with reference to the required values, ethics and behaviours of the role. **As this is a core discipline area, this section of the self-assessment has to be completed.**

Functions covered in this section include:

- Managing people and stakeholders
- Governance and accountability
- Managing risk
- Innovation and change management
- Social responsibility
- Linking operational leadership to school's or trust's strategic aims

As you complete each diagnostic, please select the option that you believe best represents your current level of experience or responsibility. It is a best-fit model and will provide you with a report to identify where you are currently, identify your overall practitioner level within this discipline area and identify potential professional development opportunities relevant to Operational Leadership.

Managing people and stakeholders

Operational services delivery

☐ Assists in the delivery of operational services across the school or trust

☒ Monitors operational service delivery within the department or school or trust, escalating concerns where appropriate.

☐ Leads teams and/or departments to maintain or enhance the delivery of operational services to the school or trust.

☐ Creates a climate in which multidisciplinary teams and individuals collaborate to provide effective and responsive operational services, which reduce duplication and optimise the use of resources.

☐ This is not part of my current role.

Leadership style

☐ Supports internal collaboration to assist with the ongoing professional development of departmental colleagues.

☐ Helps facilitate the acquisition of skills and knowledge via peer-to-peer learning.

☒ Champions an inclusive leadership style that enables wider collaboration and develops the school's or trust's capability in readiness to respond to new opportunities and challenges.

<https://www.isbl.org.uk/self-assessment>

ISBL Self-Assessment



Lee Herridge

Head of Professional Development

Dixon Academy Trust



ISBL Standards Self-Assessment

8 September 2023



2.88

Assessment

**Your overall level across the
Professional Standards is:**

Lead Practitioner Level

Overall Feedback

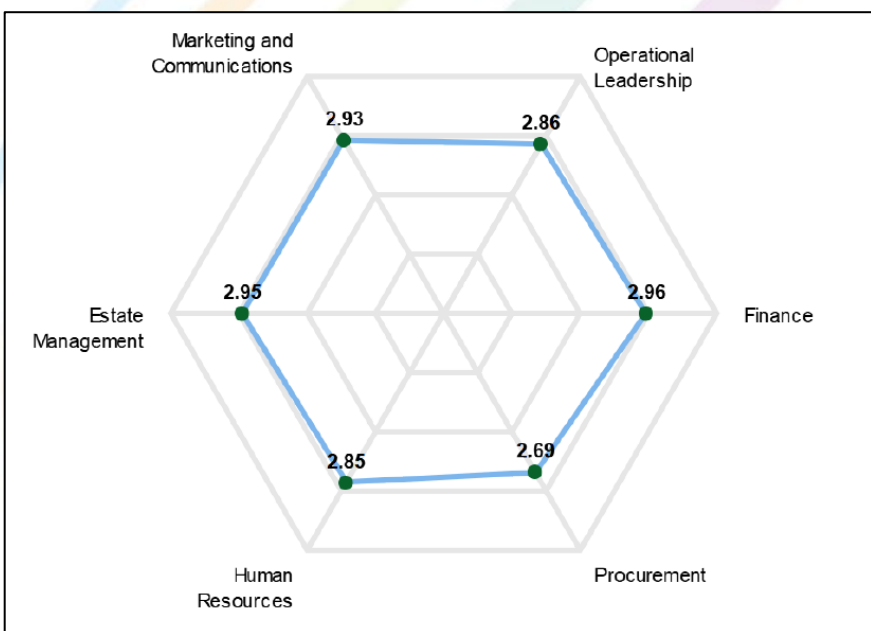
As you have scored between **2.49–3.48**, you are currently operating at **Lead Practitioner Level**.

If your score is between **2.49–2.96**, then you are at the lower end of the Lead Practitioner level. To improve your score, you will need to establish areas where your current knowledge and experience fall slightly short of a lead practitioner (see areas for development on the final page). By reading the corresponding knowledge descriptors contained within the professional standards, you will be able to quickly identify the learning you need to undertake to progress to a higher level.

If your score is between **2.97–3.48**, then working on developing your knowledge in certain areas may help you to progress towards Strategic Practitioner level. To become more strategic in your role, you may want to consider undertaking one of the qualifications suggested in the discipline area feedback.

A good starting point to help you to improve your score or progress to a higher level is to create a Personal Development Plan (PDP) to identify 3–5 areas where you may wish to improve your knowledge and experiences. You can download the ISBL PDP template by clicking [here](#).

ISBL Self-Assessment



Operational Leadership



Section Feedback

As you have scored between 2.48-3.48 you are currently operating at Lead Practitioner Level in the Operational Leadership discipline.

If your score is between 2.49-2.96 then you are at the lower end of the Lead Practitioner level. To improve your score you may want to identify areas where you may be classed as Foundation or Associate and read the corresponding Knowledge descriptor in the Professional standards in the next level to identify the knowledge needed to progress to the next level.

If your score is between 2.97-3.48 then working on developing your knowledge in certain areas may help you to become more strategic in your role. To become more strategic in your role you may want to consider taking one of the following qualifications:

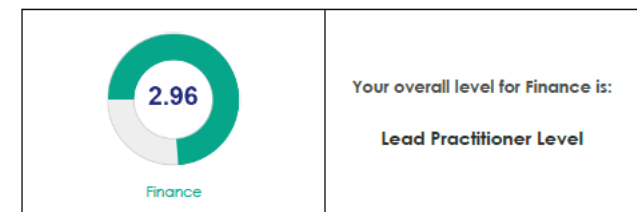
Certificate in Strategic Educational Leadership - A level 7 post-graduate module delivered by the University of Chester. More details can be found by clicking [here](#).

CIPFA Diploma in School Financial and Operational Leadership - A level 7 equivalent diploma qualification that focuses on Financial and Operational Leadership in an educational content. More details can be found by clicking [here](#).

Function: Managing people and stakeholders



Finance



Section Feedback

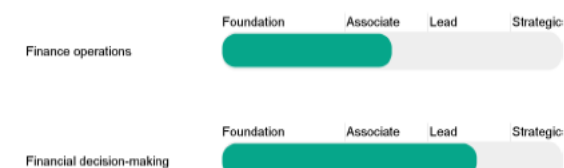
As you have scored between 2.49-3.48, you are currently operating at Lead Practitioner Level in the Finance discipline.

If your score is between 2.49-2.96, then you are at the lower end of the Lead Practitioner level. To improve your score, you will need to establish areas where your current knowledge and experience fall slightly short of a lead practitioner. By reading the corresponding knowledge descriptors contained within the professional standards, you will be able to quickly identify the learning you need to undertake to progress to a higher level.

If your score is between 2.97-3.48, then working on developing your knowledge in certain areas may help you to progress towards Strategic Practitioner level. To become more strategic in your role, you may want to consider undertaking the following qualification:

- CIPFA Diploma in School Financial and Operational Leadership - A level 7 equivalent diploma qualification that focuses on Financial and Operational Leadership in an educational content. More details can be found by clicking [here](#).

Function: Financial administration and regulatory compliance



ISBL Self-Assessment

Areas for Development

In the following sections of the Standards, you have identified at lower levels than your overall score of **Lead Practitioner Level**. These sections may therefore be areas where you may look to improve your knowledge in the future:

- Operational Leadership** - Operational services delivery
- Operational Leadership** - Equality, diversity and inclusion (EDI)
- Operational Leadership** - Organisational improvement
- Operational Leadership** - Policy review
- Operational Leadership** - Use of technology
- Operational Leadership** - Cybersecurity
- Operational Leadership** - Project management

As detailed in your overall feedback above, a good starting point to help you to improve your score or progress to a higher level is to create a Personal Development Plan (PDP) to identify 3–5 areas where you may wish to improve your knowledge and experiences. You can download the ISBL PDP template by clicking [here](#).

By reading the corresponding knowledge descriptors contained within the professional standards, you will be able to quickly identify the learning you need to undertake to progress to a higher level and can set targets to help you improve this knowledge.

Performance Development Plan



Personal Development Plan



Name:		Job Title:	
Review date:		School / trust:	



Using your self-assessment report, identify 3-5 areas from the ISBL professional standards where you may have scored lower than in other areas. Read the guidance and exemplars on the following page and then set out a plan below to identify the steps you will take to improve your knowledge and experiences in each area:

Discipline area	Function / Descriptor	Current practitioner level	What is my learning need (use knowledge descriptors)?	What will I do to achieve this?	Success criteria	Target dates for review

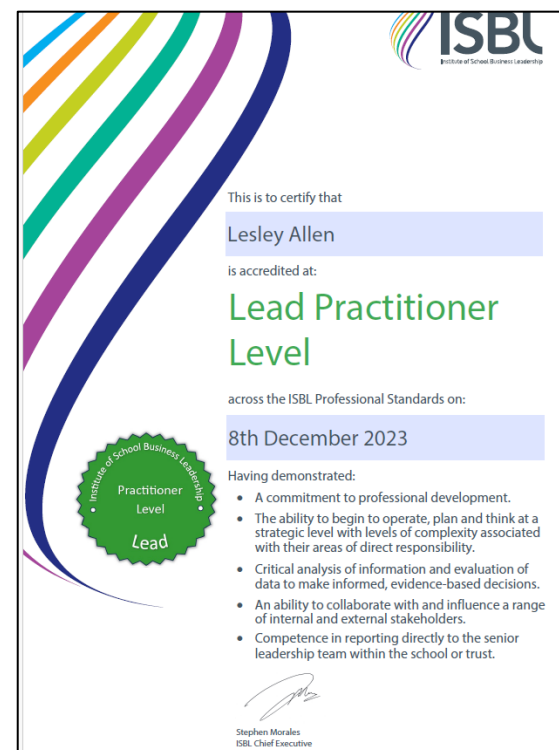
ISBL Accreditation



Once you have completed the self-assessment, individual members can apply to ISBL for formal accreditation against the identified practitioner level. To do this, you will need to provide three pieces of evidence:

1. Self-assessment report
2. A signed employer declaration
3. Proof of relevant qualifications

<https://www.isbl.org.uk/practitioner-level-accreditation>



Career Pathways

Generalist

Administrator,
Officer, Assistant



School or Trust
Business Manager,
local business
support in a trust,
team leader
within a central
team



School or Trust
Business Leader,
Regional Business
Leader,
Operations
Manager



Executive / Senior
Leader (CFO, COO,
Business Director,
Operations
Director, Deputy
CFO / COO)

Specialist

Finance / HR /
Estates / IT /
Procurement etc.
**Administrator /
Officer / Assistant**



Finance / HR /
Estates / IT /
Procurement etc.
**Manager / Team
Leader**

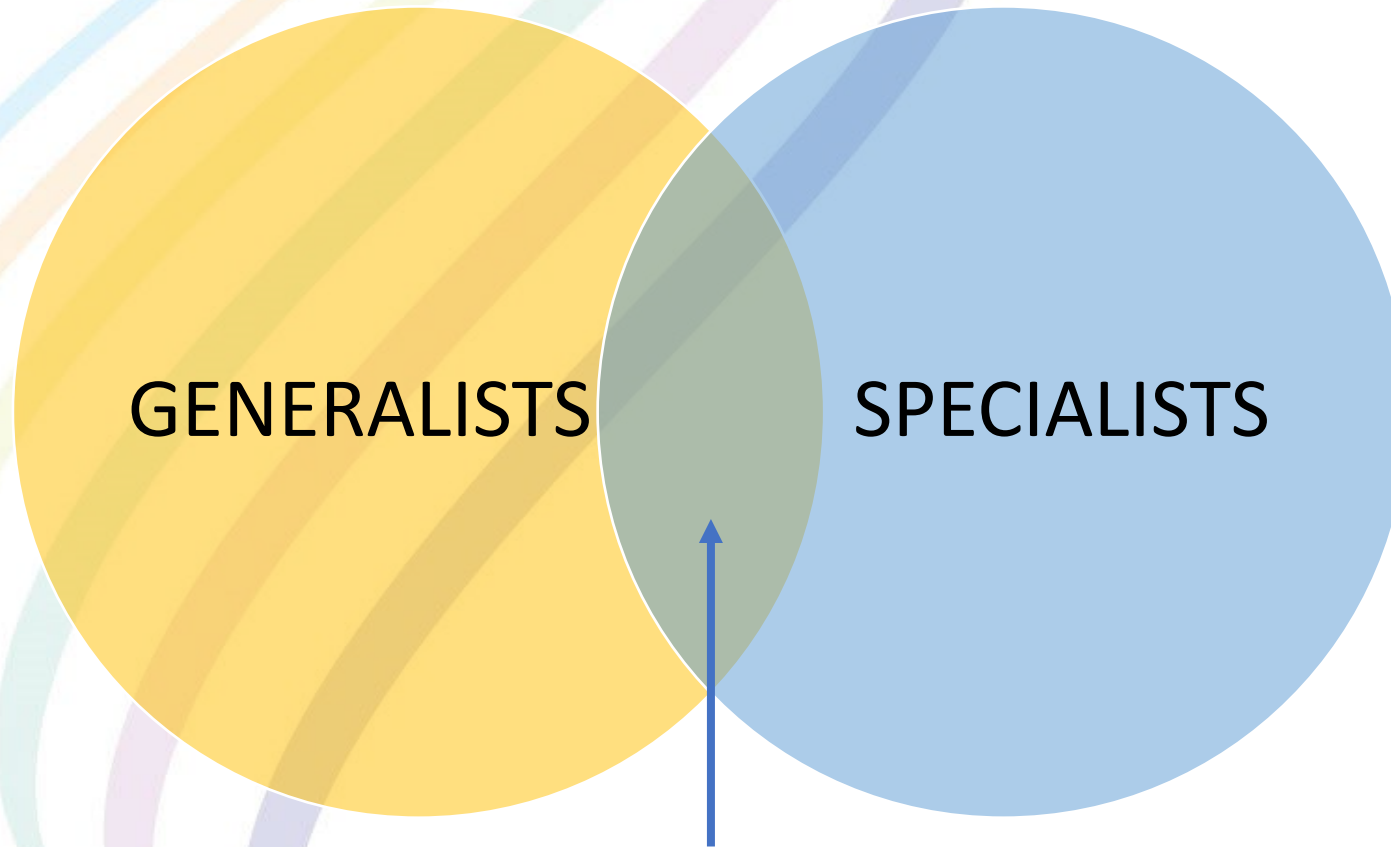


**Head of Finance /
HR / Estates / IT /
Procurement etc.**



Finance / HR /
Estates / IT /
Procurement etc.
Director

Career Pathways



GENERALISTS

SPECIALISTS

“Specialists in transition”

Increase in generalists who are starting to prepare for specialist roles in the future through increasing current experiences and/or undertaking specialised qualifications (e.g. CIPD).

This can be based on school / trust emerging roles and strategic priorities.

Career Pathways – ISBL website

Career Pathways



More information



More information



More information



More information

The ISBL website clearly articulates four career pathways for School and Trust Business Professionals from entry through to executive level, which correspond with the practitioner levels of the ISBL Professional Standards.

<https://www.isbl.org.uk/career-pathways>

Career Pathways



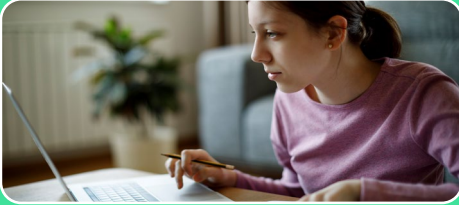
FOUNDATION

- New-entrants to the profession / Aspiring SBPs / Administrative role
- Be qualified to (or working towards) level 3 or above

Opportunities / Benefits

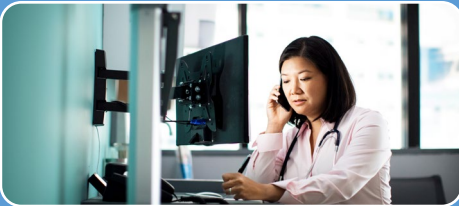
- PD and career pathway development advice (different destinations)
- Self-assessment
- Mentoring (mentee) and networking
- Professional development – Discounted training opportunities.
- **Annual student conference** focused on career development and support
- Free regional conference and discounted national conference attendance

Career Pathways



ASSOCIATE

- School or Trust Business Manager, trust team leader or specialist manager.
- Be qualified to (or working towards) level 4 or above.



LEAD

- School or Trust Business Leader, Regional Business Leader or specialist lead.
- Be qualified to (or working towards) level 5/6 or above.

Opportunities / Benefits

- PD and career pathway development
- Mentoring (mentee) and networking
- Self-assessment and Accreditation
- Professional development – Discounted training and level 4-7 qualifications.
- Policy influence.
- Free regional conference and discounted national conference attendance
- Member library resources repository

Career Pathways



STRATEGIC

- Executive/Senior Leader (FD, CFO, COO, Director) or specialist director.
- Be qualified to (or working towards) level 7 or above.

Opportunities / Benefits

- Self-Assessment / Accreditation for organisational design.
- Professional development – Discounted training and level 6/7 specialist qualifications and
- Networking opportunities
- Policy conversations / DFE consultations.
- Fellowship (peer-lead conversations).
- School Resource Management Advisor (SRMA) accreditation.
- System leadership opportunities - Supporting colleagues or establishments via mentoring, coaching and consultancy.
- Access and contribution to research.
- **Annual Executive conference** – Operational Excellence conference.

SBM Generalist Qualification Pathways

L4 Diploma in School Business Management /
Level 4 School Business Professional Apprenticeship (SBPA)



L5 CMI Diploma in Management and Leadership
L5 CMI Certificate in Project Management

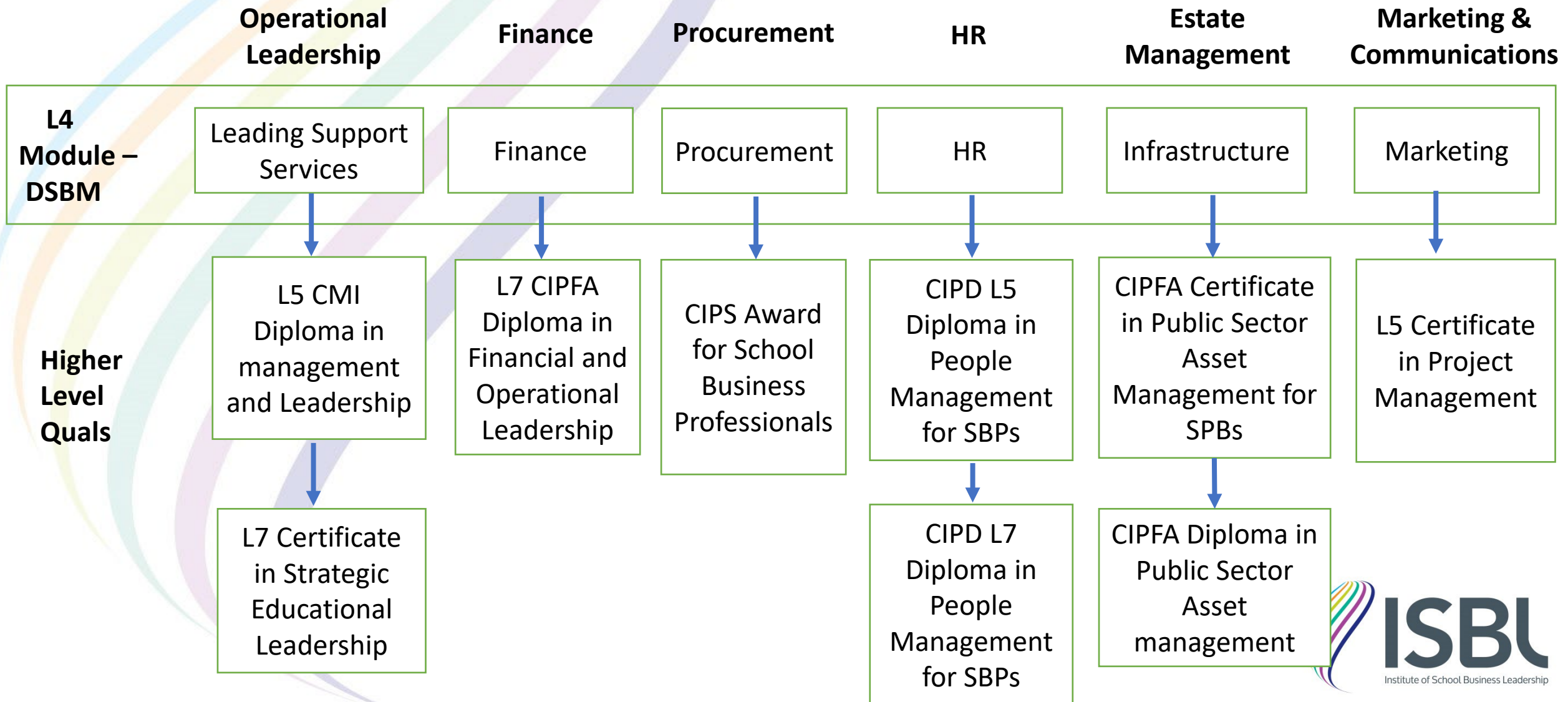


Level 6 Chartered Manager Degree Apprenticeship (CMDA)



L7 Certificate in Strategic Educational Leadership
L7 Senior Leader Degree Apprenticeship

SBM Specialist Qualification Pathways



Training Opportunities

FINANCE

ICFP Fundamentals

Using ICFP Accurately and Effectively in your school: Part 1: Data and Metrics / Part 2: Diagnosis of issues and strategic Decision-Making

ESTATES MANAGEMENT

Introduction to School Estates Management / Managing School Business Compliance

IOSH Accredited H&S for School Business Professionals (2 day course)

MARKETING

'What a results-driven school Marketing strategy looks like' webinar

Bitesize Marketing Webinar series: Introduction to Marketing

Strategic Marketing masterclass

OPERATIONAL LEADERSHIP

Data Mastery: Empowering Schools for Success - Webinar Series



Top Tips!

- Understand your strengths and areas for development (the ISBL self-assessment tool is a great place to start!)
- Make sure you thoroughly plan your performance management or development conversation with your line manager
- Plan your development journey – where do you want to be in 1-, 3- and 5-year's time? How will you get there?
- Overcome those initial barriers - Even if you spent an hour a week on CPD you would be doing more than most!

Questions?

