



New Professional Standards  
**Stephen Morales**  
**CEO, ISBL**



# History

- National College Competency Framework
- ISBL's work on professionalisation
- 2015 launch of dedicated SBP standards
- National qualifications panel ensuring standards underpin CPD



# Revisions responding to increased complexity

- Financial Assurance
- More focus on resource optimisation
- Organisational design and growth
- Developing central teams
- Technical HR
- EDI
- Sustainability
- The increasing role of technology



# Context and roles

- Tiered approach
- Generalist, specialist and executive roles
- Designed to facilitate incremental career progression
- Help practitioners identify the right training and qualifications to support their professional development journey
- Help schools and trusts identify any skills gaps



# Certification

- Self-assessment
- Employer statement of support
- ISBL assessment and validation
- All leading to formal certification



# Employer guidance

- Designed to support more meaningful employer involvement in SBP performance management
- To assist the recruitment process
- To aid the design of job descriptions and job specifications
- To help benchmark pay



# Policy context


- SRM programme of work
- SBP strategy
- Academies regulatory and commissioning review
- Capability – CEO and CFO development
- ATH expectations



# ISBL Professional Standards



# ISBL self-assessment



ISBL  
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 schools or trusts capability in readiness to respond to new opportunities and challenges.



# ISBL self-assessment



**Lee Herridge**

**Head of Professional Development**

**Dixon Academy Trust**



**ISBL Standards Self-Assessment**

8 September 2023



Assessment

Your overall level across the  
Professional Standards is:

**Lead Practitioner Level**

## Overall Feedback

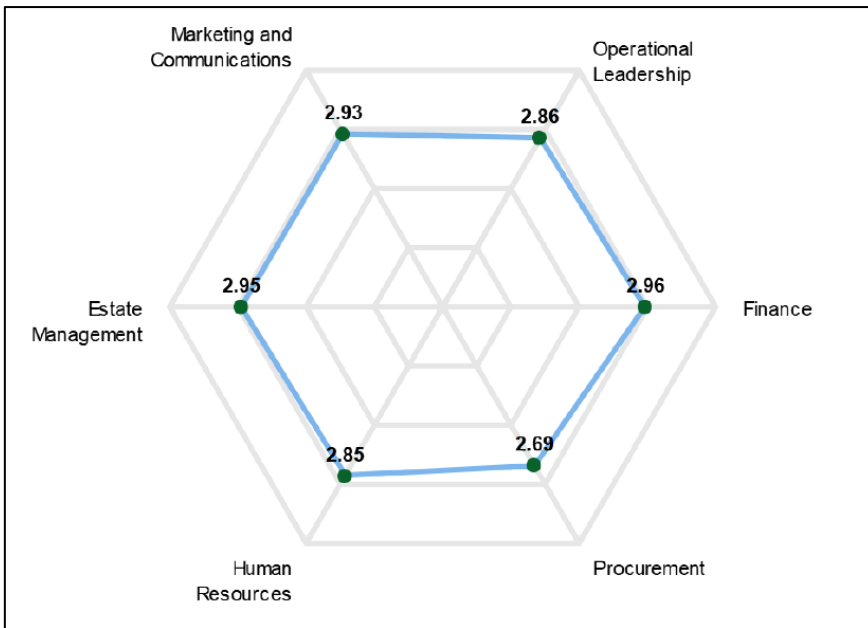
As you have scored between **2.49–3.48**, you are currently operating at **Lead Practitioner Level**.

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:

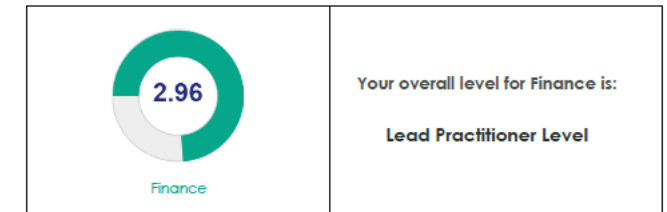
Certificate in Strategic Educational Leadership - A level 7 post-graduate module delivered by the University of Chester. More details can be found by clicking [here](#).

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



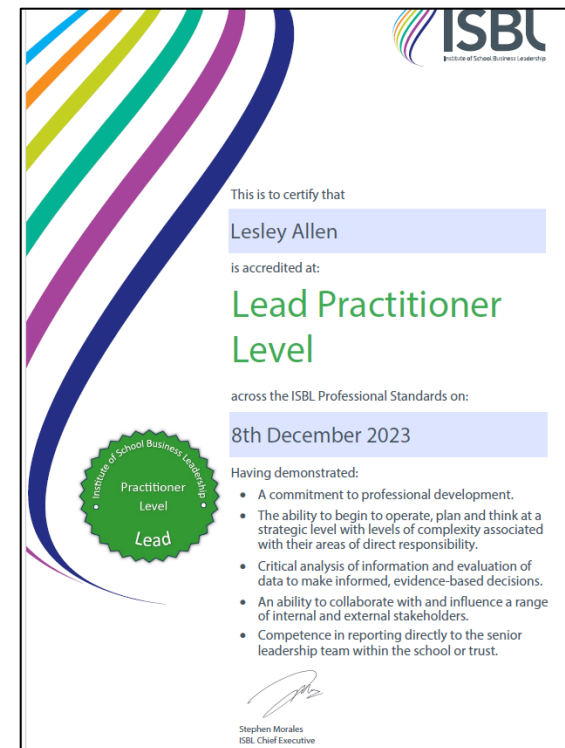
# ISBL accreditation



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>



# SBM generalist qualification pathways

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



L5 Diploma in School Business Leadership  
L5 CMI Diploma in Management and Leadership



Level 6 Chartered Manager Degree Apprenticeship (CMDA)



L7 Certificate in Strategic Educational Leadership

# SBM specialist qualification pathways

**Operational Leadership**

**Finance**

**Procurement**

**HR**

**Estate Management**

**Marketing & Communications**

**L4 / L5 Module – DSBM**

Leading Support Services

Finance

Procurement

HR

Infrastructure

Marketing

**Higher Level Quals**

L5 CMI Diploma in Management and Leadership

L7 CIPFA Diploma in Financial and Operational Leadership

CIPS Award for School Business Professionals

CIPD L5 Diploma in People Management for SBPs

CIPFA Certificate in Public Sector Asset Management for SPBs

L5 Diploma in Digital Learning Design

L7 Certificate in Strategic Educational Leadership

CIPD L7 Diploma in People Management for SBPs

CIPFA Diploma in Public Sector Asset management



# To find out more

Contact ISBL's Head of Professional Development:

[Lee.Herridge@isbl.org.uk](mailto:Lee.Herridge@isbl.org.uk)

Or visit our website to register and download a copy of the new standards:

[www.isbl.org.uk](http://www.isbl.org.uk)

