



# Multi-Academy Trust School Business Leaders Wellbeing Index 2025

May 2025



# Acknowledgements

**Education Mutual** extends its gratitude to the **Wellbeing Steering Group** at **Education Mutual** for providing valuable direction and structure to this research study. We also appreciate the collaboration of the following organisations in promoting the research within their membership and contacts: the **Association of School and College Leaders (ASCL)**, and the **Institute of School Business Leadership (ISBL)**.

A special thank you goes to the **Confederation of School Trusts (CST)**, the **Multi-Academy Trust Association (MATA)**, and **Value Match Sustainability** for their significant contributions to this new edition of the research. Their ongoing support, and the dedication to their networks helps to drive meaningful change across the sector. By ensuring this important work reaches those who can make a difference and their inclusion within this research contributes towards more sustainable future for education.

Last but not least, a special thank you goes to **all School Business Leaders (SBLs)** who dedicated their time to participate in the online survey and interviews. Without their valuable contributions, this report would not have been achievable.

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## Foreword



Those working across school and trust operations are the unsung heroes of education. Teachers are (rightly) seen as superheroes in society – but often, those who are not regularly seen by parents or mentioned by name over dinner go under the radar.

In recent years, the Department for Education has placed greater emphasis on supporting and acknowledging the work of school business leaders, but – as is borne out in the data – we all need to go further still.

We know the myriad of challenges facing the entire system – funding, recruitment and retention, the ‘SEND crisis’, mental health of young people and so on – but often those leading our school operations bear the brunt of dealing with their intricacies; they are at the forefront of overseeing recruitment processes, trying their best to balance the books, doing their utmost to make sure staff and students feel a sense of belonging. It is no wonder, then, that the report shows the anxieties they feel are so linked to the wicked problems we are grappling with.

While there is little sign of those problems disappearing any time soon, there are reasons to be hopeful. It is heartening to see the overwhelming majority (83%) already feel their schools support employees well, and that many of the recommendations are within our power to implement – whether it be more flexible working, better promotion of existing support services so more colleagues benefit, or ensuring an inclusive culture so the roles of non-teaching superheroes are understood.

But we also need to recognise those working at trust, rather than school, level feel the same anxieties. They are not a remote, abstract ‘central team’, but colleagues equally wrestling with their own workload, work/life balance, funding constraints etc. I’m really pleased to see they are included in this report, and hope to see an equal focus on those positions in the years to come.

The School Business Leaders Wellbeing Index is an increasingly influential insight into an often overlooked, but vital, part of our sector. I’m delighted Education Mutual have produced this trust-specific report, and that CST has been able to offer some reflections. I look forward to seeing how trusts use the findings to continually improve their wellbeing support.

### **Samuel Skerritt**

Director of Public Affairs and Policy  
Confederation of Schools Trusts

# Section 1

# Introduction

# Introduction

## The Mental Health and Wellbeing Index of School Business Leaders working in a Trust setting throughout England and Wales

In line with our continued dedication to the education sector, Education Mutual is proud to release a tailored, trust-specific version of the 2025 findings in the annual report, School Business Leader Wellbeing Index 2025.

Throughout this ongoing research, we employ the generic term ‘SBLs’ to acknowledge the various job titles associated with individuals fulfilling management roles. The collective contributions of School Business Leaders, School Business Managers, Human Resources, and administrative staff are crucial in ensuring the efficient operation of state-funded primary, secondary, and special school academies, trusts and multi-academy trusts.

### Who is this report for?

A harmonious and healthy work environment contributes to the overall success of individuals and the entire educational community. The School Business Leader Wellbeing Index aims to spark positive change to extend its benefits to all working roles within the education sector. By prioritising wellbeing, we create an environment where everyone can perform at their best, ultimately enhancing the quality of education.

### School Business Leaders

For School Business Leaders (SBLs), we hope this research not only validates your experiences but also provides a practical tool to help you navigate the ongoing changes within the education sector. By comparing this year's findings with previous years, you can track whether improvements are being made in response to your feedback and whether those changes are positively impacting your role.

### Trust Leaders

This research is also tailored to trust leaders, aiming to deepen their understanding and perception of the SBL role, as well as the actions they're taking to address staff wellbeing through their people strategy. Section 4 specifically highlights their valuable insights, strategies, and ongoing approaches, with the goal of influencing the wider sector and promoting a collaborative approach.

### Colleagues of School Business Leaders

To all colleagues of a School Business Leader, regardless of your educational setting, we hope this report offers deeper insights into their role and creates opportunities to reflect on how you can collaborate more effectively to support them. Since you often spend more time with colleagues than with family, a supportive work environment is essential for everyone's wellbeing.

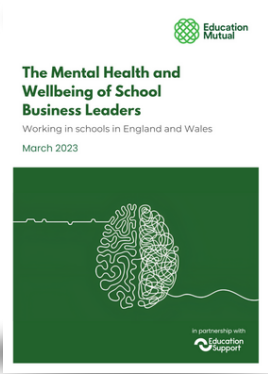
## Executive summary

Education Mutual remains committed to deepening the understanding of the wellbeing needs of School Business Leaders (SBLs). We are pleased to now present the updated findings of our 2025 edition of this annual research, specifically tailored to the trust sector. This edition is a direct response to the requests and feedback received from Education Mutual member schools, trust leaders, and delegates within the audience at various Education Mutual-led talks/speaking engagements at events throughout from 2023-2025.

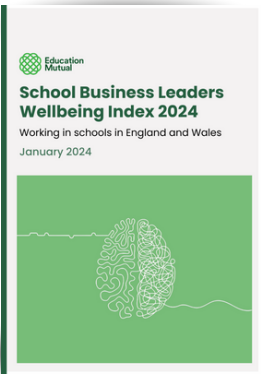
### Critical questions that shaped this specific study:

- What are the work-related factors which have an impact on your mental health and/or wellbeing in your role as a School Business Leader within your trust?
- Which types of mental health and wellbeing support does your trust currently have available for you to access?
- Which services would be/are of most benefit in tackling these work-related issues?
- What initiatives or strategies are trust leaders implementing within their trust to improve the wellbeing culture for their staff?

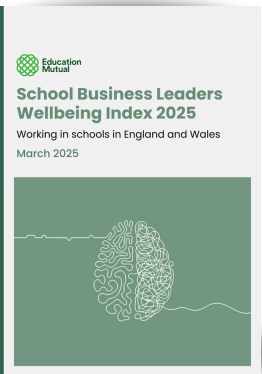
## Previous versions of the Maintained School research



2023 edition:



2024 edition:



2025 edition:

All editions of these reports are available to download, prints and share via <https://www.educationmutual.co.uk/school-business-leader-wellbeing-index-2025/>



Summarised Methodology

We are thrilled to have received an incredible **715** responses to our online survey, all from School Business Leaders working across England and Wales.

This year, an additional survey was distributed to Trust Leaders, CFOs, COOs, and senior leaders within trust settings to gain deeper insights into their understanding of the role of a school business leader. The survey provided leaders in the trust sector with an opportunity to highlight the specific challenges, mistakes, and changes they are implementing to improve staff wellbeing and drive ongoing transformation within the sector.

As this research continues annually, we are noticing a significant increase in participation, which strengthens the value of the findings. The more responses we receive, the more your feedback empowers us to identify key trends, advocate for meaningful change, and work towards improving your role and working conditions. Your input is vital in shaping the future of the profession and ensuring that wellbeing remains a top priority across the sector.

The full appendix and methodology for the **School Business Leader Wellbeing Index 2025 – Working in Multi-Academy Trusts in England and Wales** – is available to browse towards the back of the report.

Respondents by category of school worked for: Base: all respondents (n=715)

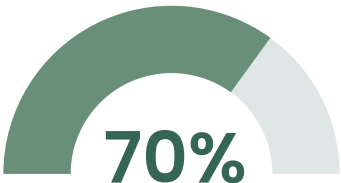


The proportion of respondents working in **Multi-Academy Trusts (MATs)** increased by 6% compared to 2023



The proportion of respondents working in a **Single academy Trusts (SATs)** decreased by 3% compared to 2023

Respondents by phase of setting worked for: Base: all respondents (n=715)



of respondents worked in a **Primary School**



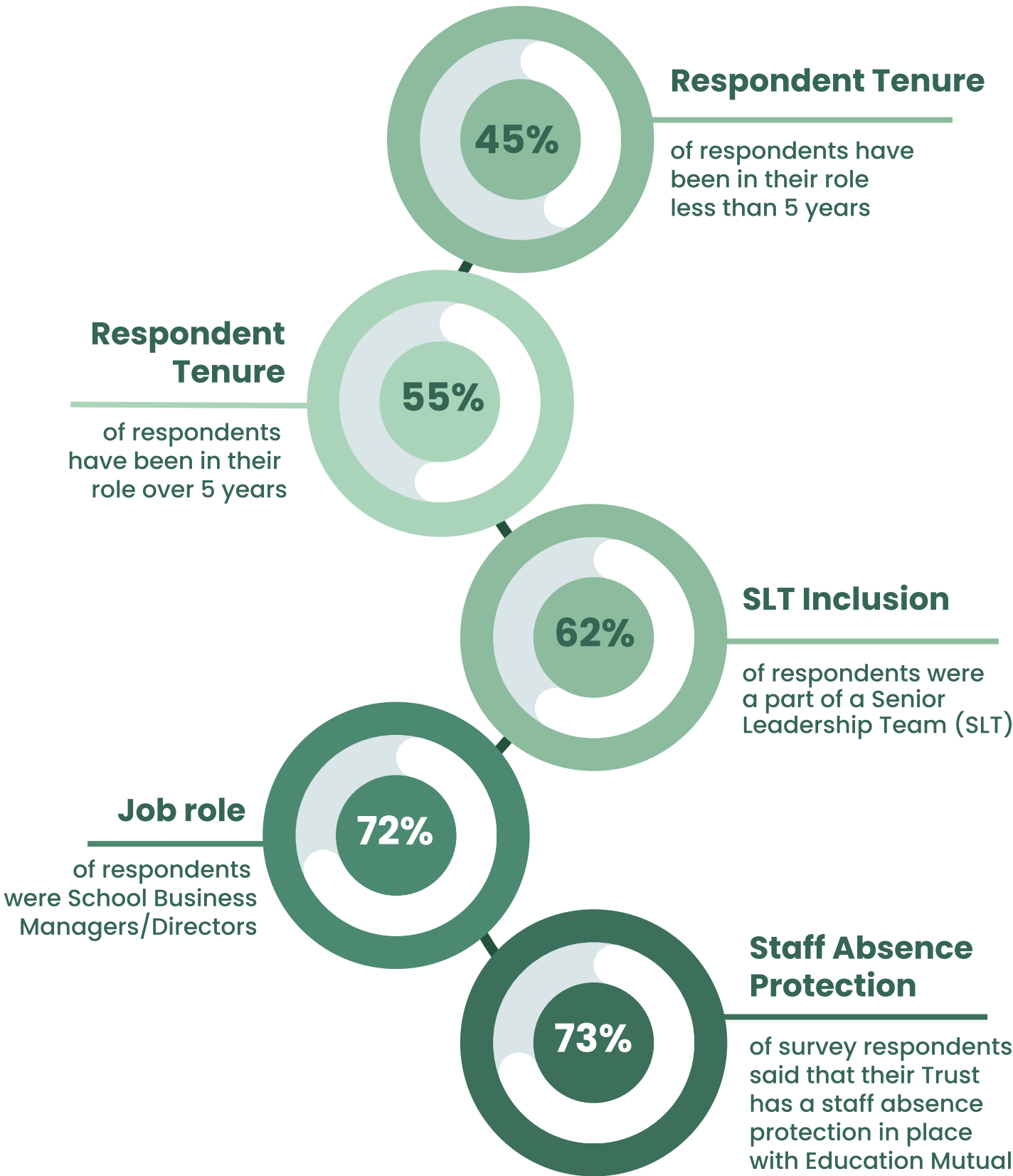
of respondents worked in a **Secondary School**



of respondents worked in **Central Trust Team**

Some key participant figures to take from this years findings:

Base: all respondents (n=715)



# Section 2

## Key Findings

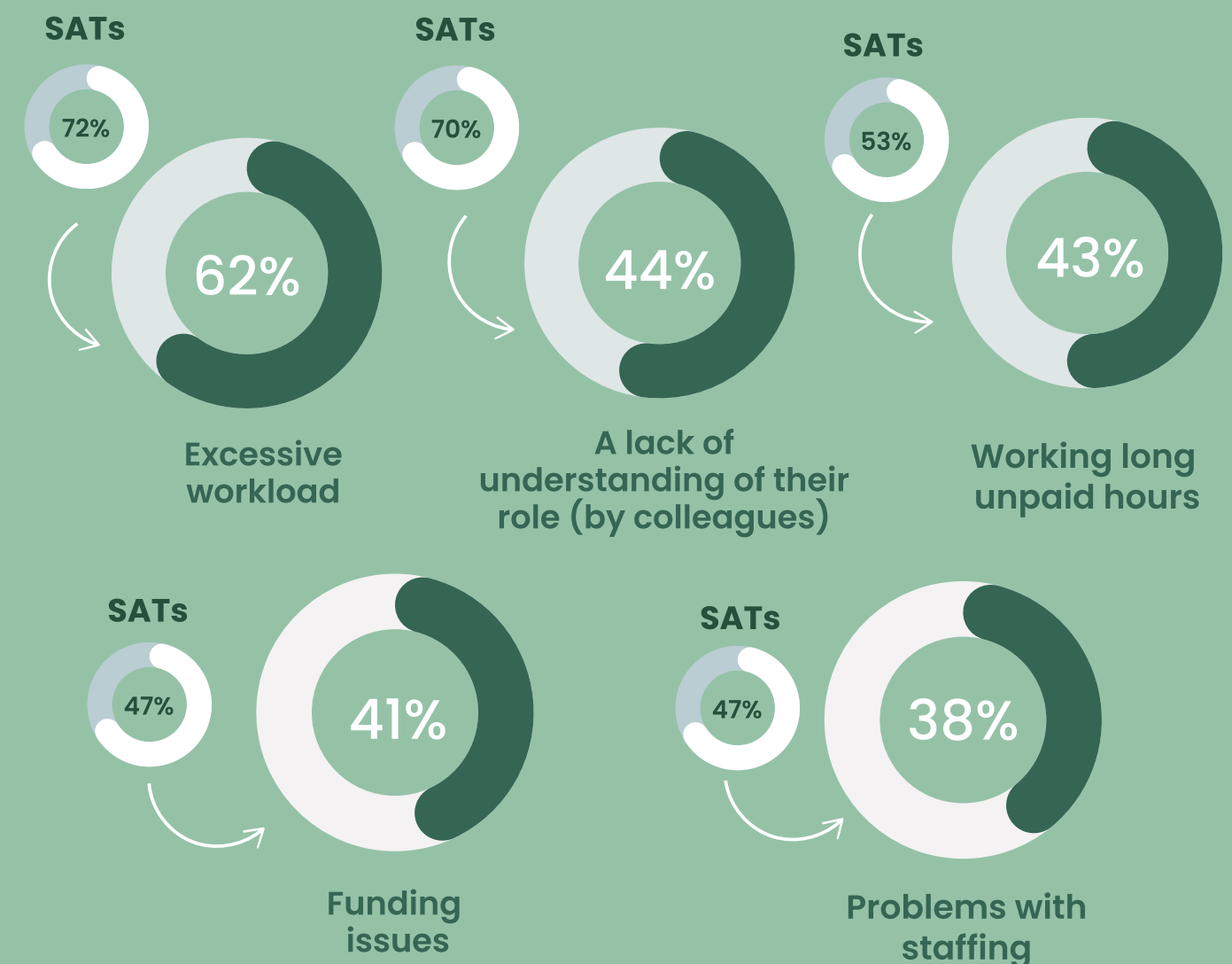
### Section 2

## Key Findings

### A) What affects SBLs' mental health and wellbeing at work?

We asked School Business Leaders about the work-relating factors influencing their mental health and wellbeing in their **Multi-Academy Trust** setting.

The top five challenges were:

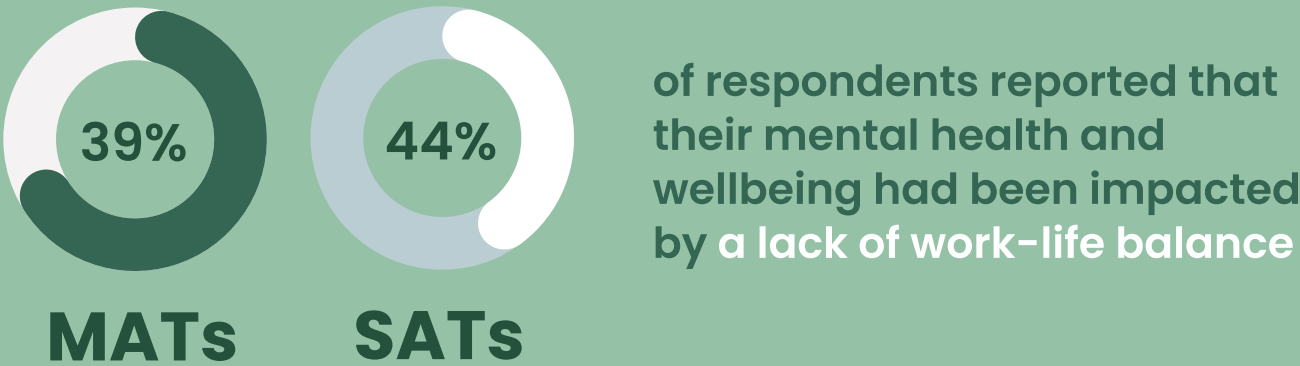


These issues were explored further in interviews with School Business Leaders. More details of each of the five challenges can be found in Section 3 of the report.

You can read the full breakdown in Appendix 1

Further findings

Some interviewees stated that the perceptions that some staff had of the SBL role and their responses to it, adversely impacted their mental health and wellbeing.



New challenges raised for 2025



You can read the full breakdown in Appendix 1

B) Perception of school employee mental health and wellbeing support

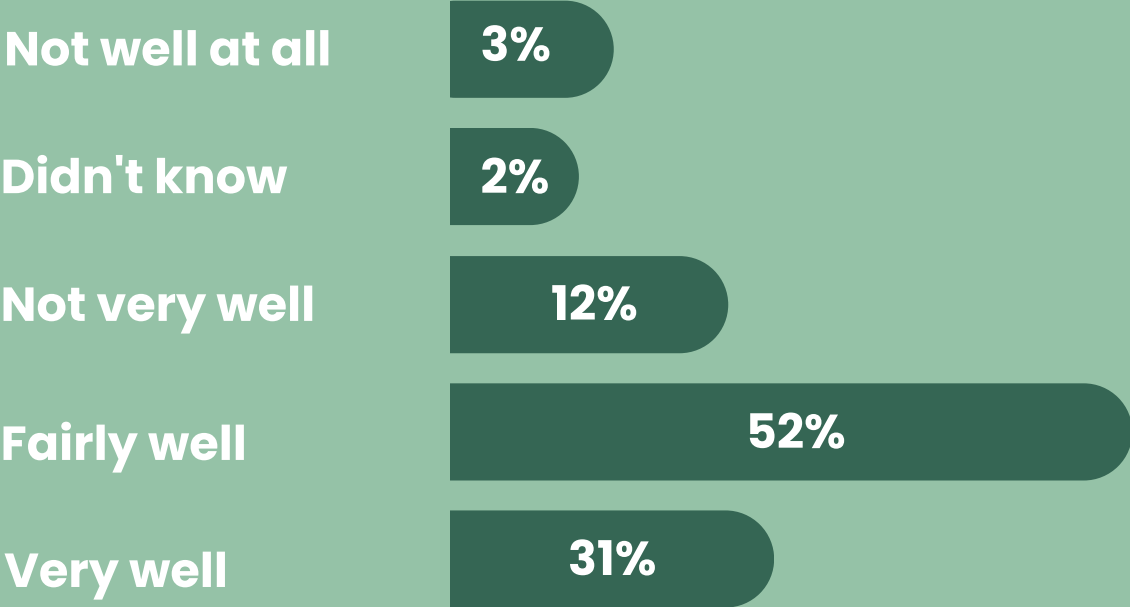
We asked School Business Leaders how well they thought their school supports all their staff who experience problems with their mental health and wellbeing.

83% of SBLs told us their schools supported their employees well (very well or fairly well)

The figure has climbed by 10%, improving on the 73% reported in the 2024 edition.



How well schools support their employees who experience problems with their mental health and wellbeing



The chart above illustrates a notable 10% increase in the number of respondents selecting 'Very well' compared to the 2024 findings, indicating an improvement in perceptions.

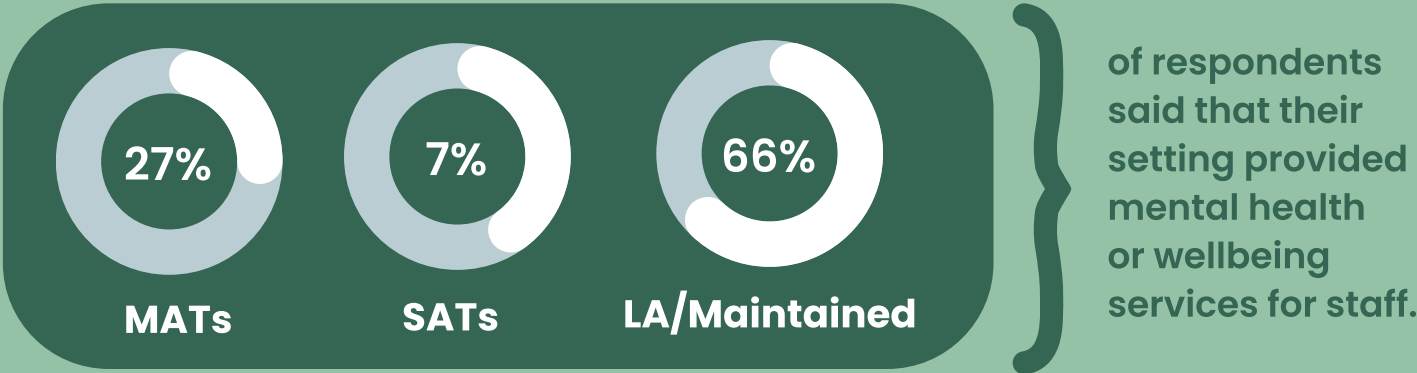
No differences in overall perceptions of support amongst survey respondents were found by region or type of school, indicating that staff in both multi-academy trusts and maintained schools reported similar levels of support. However, those working in other phases were more likely to say that their workplace supported staff well compared to infant, primary and secondary phases.

You can read the full breakdown in Appendix 2

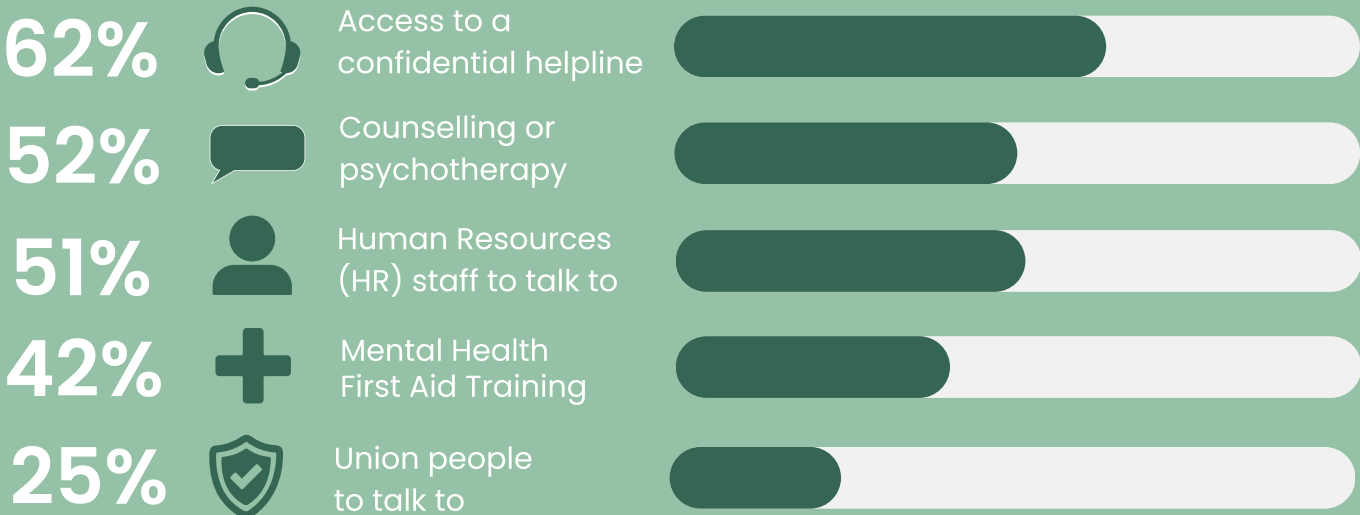
Base: All respondents (n=715)

# C) The wellbeing services being provided by schools and used by SBLs

We asked School Business Leaders which mental health and wellbeing services their setting currently provides for their staff members.



## The top five most commonly reported sources of support were:



Base: All respondents (n=715)

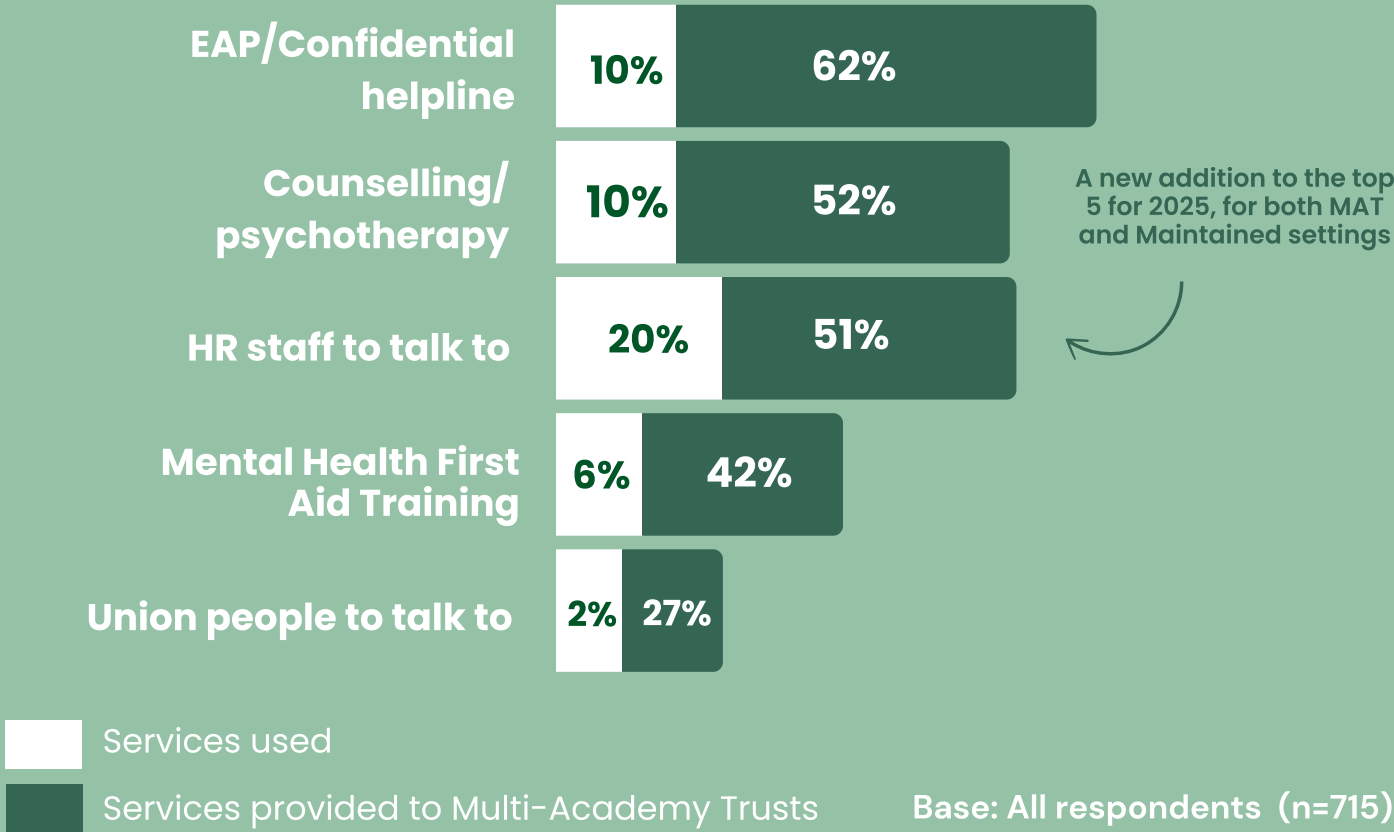
These top 5 services provided were also amongst the most commonly used services.

Respondents from **Multi-Academy Trusts** were more likely to have access to and have used HR staff to talk to (51%) compared to those from **LA maintained schools** (33%). Those working in **SATs** were less likely to have access to union staff to talk to (16%) and wellbeing sessions (16%).

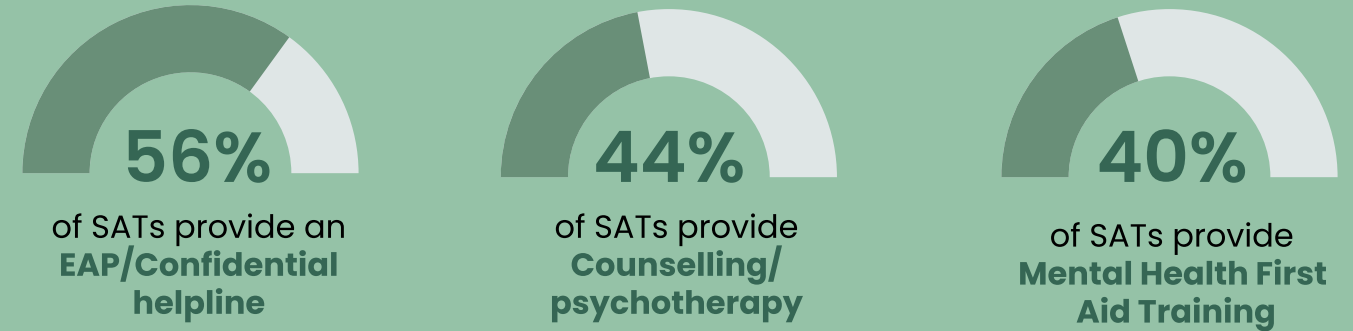
You can read the full breakdown in Appendix 3

# Mental Health and Wellbeing services provided and used

We asked School Business Leaders working within a **Multi-Academy Trust (MAT)** setting which services they had used. The chart below details the top five mental health and wellbeing services provided by MATs to their SBLs, alongside the usage rate of each service.



The percentages detailed below represent the top 3 mental health and wellbeing services provided by **Single Academy Trusts (SATs)** to their SBLs.



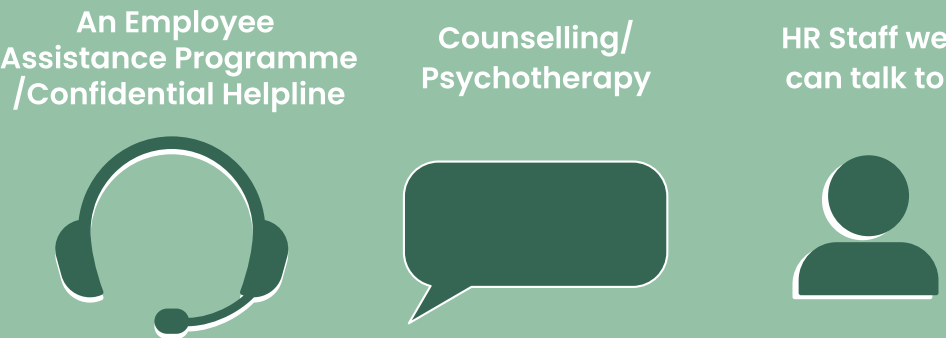
You can read the full breakdown of reported services and usage in Appendix 3



# D) The most beneficial mental health and wellbeing services

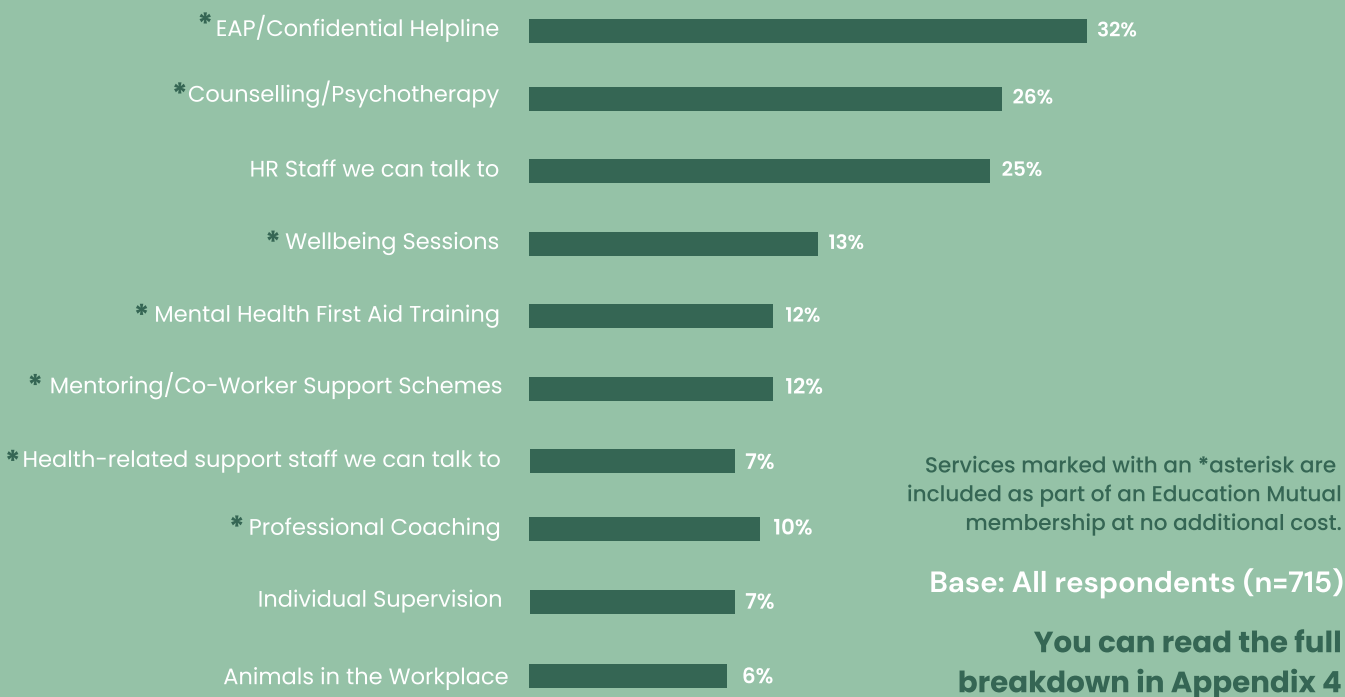
We asked School Business Leaders about the services provided by their MAT setting that prove most beneficial in assisting them in managing the work-related factors impacting their overall wellbeing.

## SBLs reported their top three services for dealing with their own mental health at work were:



## Mental health services of most benefit to SBLs when dealing with work-related factors impacting on their wellbeing

The chart below shows the top 10 services of benefit. Their first choice overall was to use an **Employee Assistance Programme confidential helpline**.



# E) Barriers for not using workplace mental health and wellbeing services

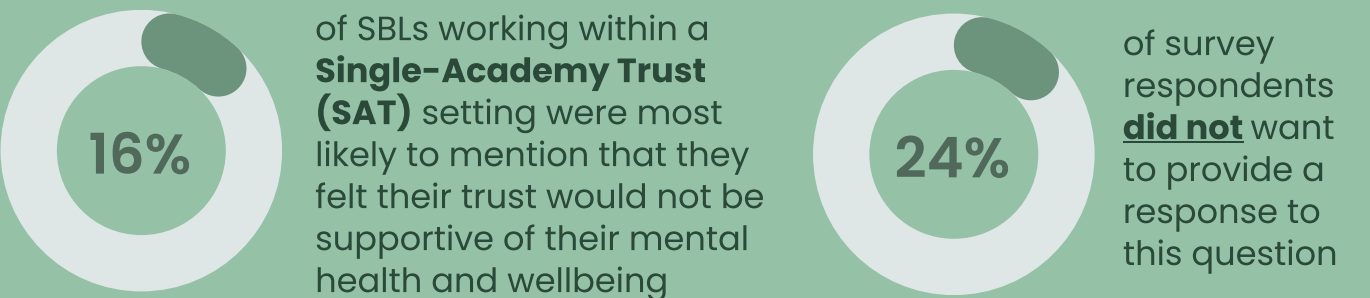
Survey respondents were asked about the barriers they faced in using or accessing the available support methods provided by their multi-academy trust.

## The concerns for not using services provided by their school were:



You can read the full breakdown of reported services and usage in Appendix 5

## Further results from this survey question:



# Section 3

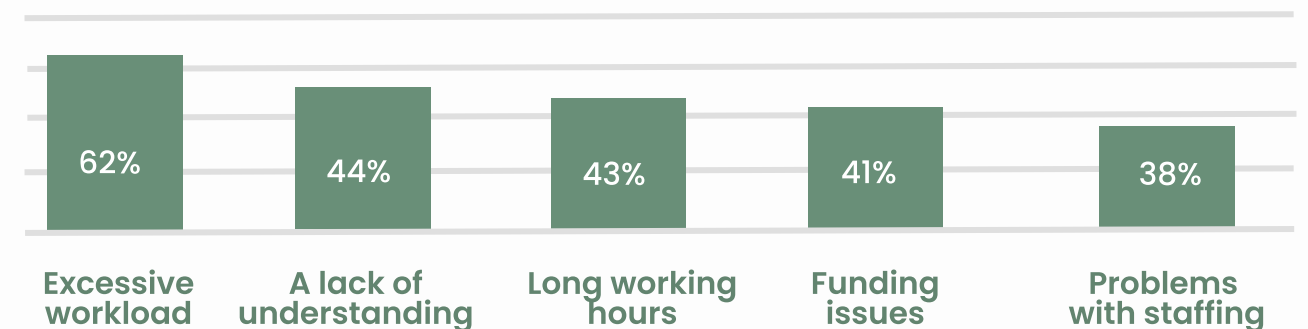
## Current issues faced by SBLs working in schools

### Current issues

Our goal was to gain a deeper understanding of the various challenges currently faced by School Business Leaders working in a Multi-Academy Trust setting.

This section of the report provides a detailed overview of the most common work-related factors discovered through separate interviews conducted with survey participants. Our aim was to specifically examine the wide range of challenges that School Business Leaders (SBLs) encounter in their professional roles, with the goal of informing Trust Leaders and offering tailored solutions.

Interviews were held with survey respondents which explored the following factors identified in the survey as affecting SBLs' mental health and wellbeing:



Throughout each interview that took place, a set of recurring themes surfaced, which we outline in this year's findings. We appreciate the contributions of those who volunteered to participate, as their interviews not only shed light on individual experiences but also play a crucial role in broadening an understanding of the common patterns and perspectives currently occurring within Multi-Academy Trusts.

Interview sample:

Of those who opted into further research, **97** were selected as a sample for the interviews. This selection was based on representing a mixture of phases of education, category/type of trust, locations and role types.

The final interview sample of SBLs included those working in:

Catagory:



Single Academy Trusts



Multi-Academy Trusts

Role:



School Business Leaders/Managers



Finance based School Business Leader roles



Operations based School Business Leader roles

Phase:

Throughout mixed Multi-Academy Trusts, the sample featured SBLs working in/as:



Central Trust Representatives



Primary Schools



Secondary Schools

Location:



# A) Excessive workload

The survey found that:

**62%** of SBLs considered their workload within their multi-academy trust to be excessive, either all or part of the time, due to the demanding nature of the role

Both the interviewees and survey respondents consistently confirmed that the responsibilities and task loads associated with the role of a school business leader were overwhelming. Their feedback highlighted a range of recurring themes explaining why this is the case and the cumulative effect of these factors creates an environment where meeting all demands effectively becomes highly challenging.

## The main contributory factors to excessive workload were twofold

### The workload pressures of the role are unmanageable

The complexity of managing diverse needs across multiple schools, combined with limited resources and tight deadlines, can lead to overwhelming stress and difficulty in maintaining a balanced workload – which requires constant multitasking and decision-making under pressure.

“Personally yes, I would say the workload is excessive. It’s almost at the point where you have got to accept that you’re not going to be able to do everything – which is not the best of feelings really. Particularly if you want to have things in order, but you have always got to try and accept that it is almost borderline impossible to have it all in order sadly.”

(Primary Multi-Academy Trust)

### Having responsibility over a group of schools

Managing multiple schools and completing a wide range of tasks in a multi-academy trust is challenging for school business leaders due to the complexity of overseeing diverse operations across different institutions.

“Basically, I do HR, governance, payroll, operations, running the school kitchen, menus, Trust estates, IT, policy writing, trustees, compliance, health and safety, various committee for trustees as well; and I must do all of this for all four schools.”

(Primary MAT Central Team)

# Further findings (A)

Other factors raised by some school business managers were:

## Lack of funding

Several survey participants suggested introducing a supporting role to help share the responsibilities of the school business manager. However, the primary challenge they face in implementing this idea is the lack of available budget to fund this valuable support.

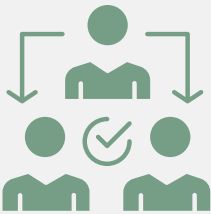
## Competing deadlines

A recurring frustration among the SBL community is that the month-end finance tasks and payroll deadlines fall within the same week.

## The unpredictable nature of requests

The expectation for school business leaders to respond quickly is often unrealistic. Staff requests for immediate action disrupt their workflow, increasing the burden and making it even harder to manage their workload and complete critical tasks that were already in progress before these unexpected emergencies arose.

Among those who participated in the additional interview process:



On average, **4 out of 5** School Business Managers agreed that their workloads could only be made more manageable if there were more staff within the Trust to delegate the workload to.



All School Business Managers working within a Multi-Academy Trust **unanimously agreed** that the scope of the role is too extensive for one singular person to manage effectively.



B) A lack of understanding of the role

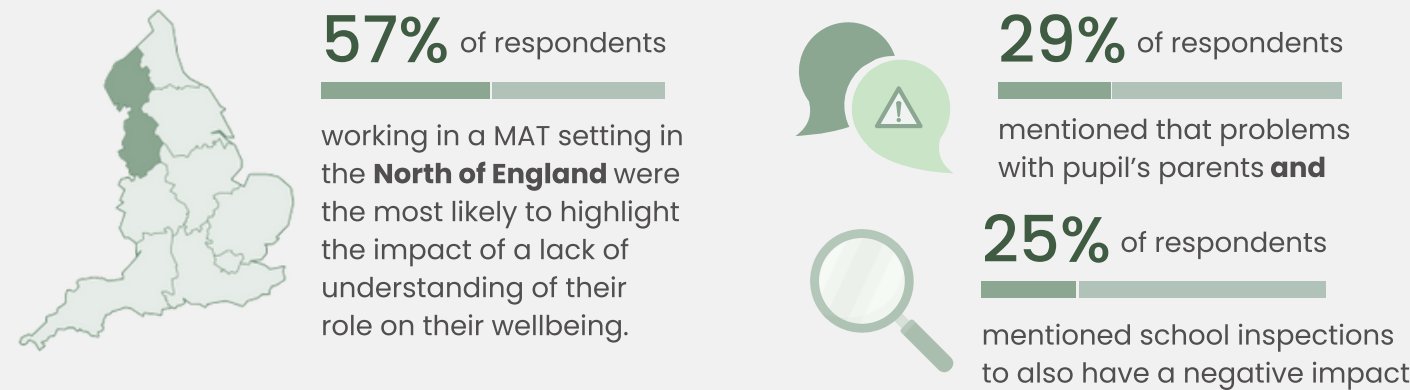
There were several references from respondents to ‘Isolation’ within the role.



Other concerns were:

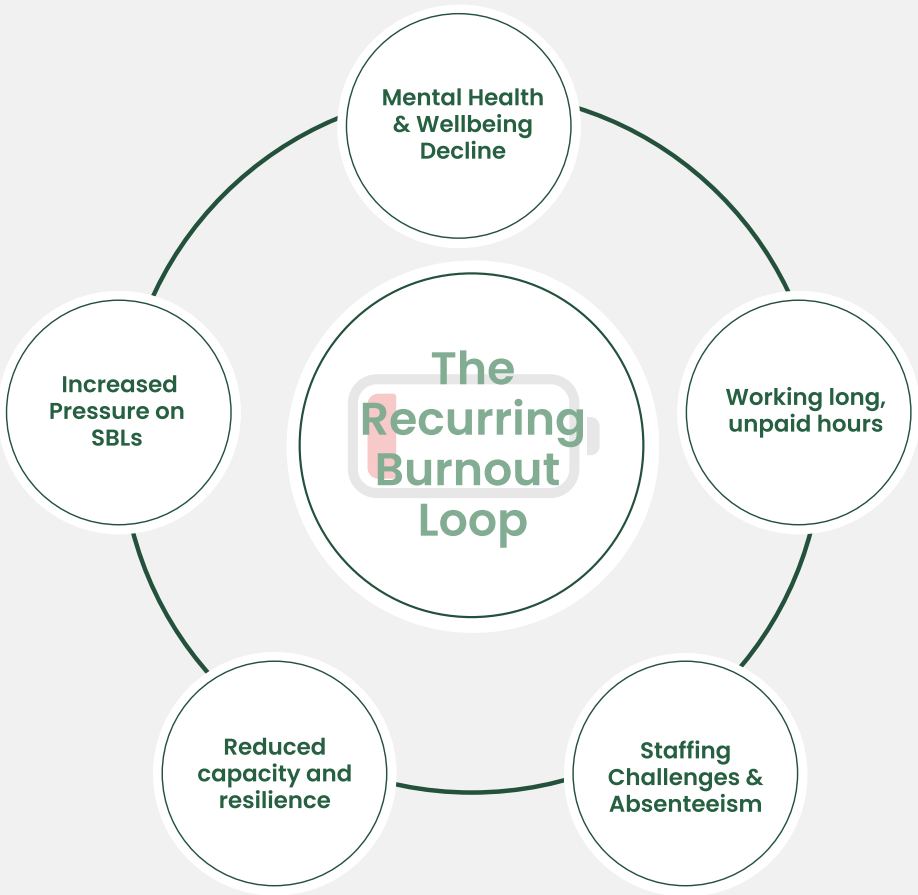
- A lack of understanding by media, and government of the school business manager role.  
The frustration felt by SBLs was primarily directed at the education sector, with concerns about workload and mental health being focused solely on teaching staff.
- Improving the understanding of the role  
Accurate job descriptions would be key to improving understanding of the role according to all interviewees. In particular, reflecting specifically the true extend of their remit needed to be better linked to pay scales.  
There was felt to be a need for parity of grade and salary for staff running the business operations with those running the education side of schools.
- Inclusion throughout the role  
Ensuring that school business managers are part of the senior leadership team, so that their contribution to decision making in school management, especially across multiple schools, is heard and valued.

Some differences were also found by category of setting for other factors:



C) Working long, unpaid hours

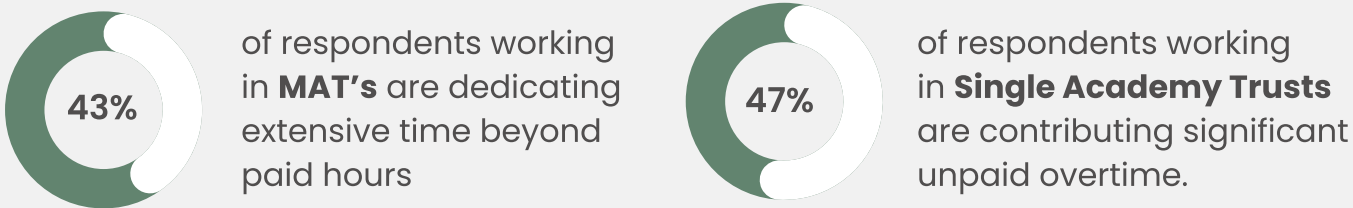
The survey found that:



The expectation to "just get it done" often leads to extended evenings, weekends, and holidays spent working, without additional pay or adequate recognition.

Roles that would typically be held by entire teams in other sectors are shouldered by a single SBL, or a small central team stretched too thin. The pressure to standardise processes across academies, deliver efficiency savings, and implement Trust-wide strategies — all while responding to the immediate, day-to-day needs of individual schools — places SBLs in a relentless cycle of high-stakes responsibility.

Additional important findings below:



# D) Funding Issues

Every School Business Leaders interviewed separately to the initial survey stated that funding issues were a significant factor affecting their mental health and wellbeing. This is the one key factor where SBLs can mitigate its impact on their wellbeing by recognising that it is beyond their control.

Several interviewees described how difficult addressing the following factors below are:

**“There is a shortfall in SEND funding”**

This factor has the greatest impact on the school business leader community due to the high number of SEND students and the increasing complexity of their needs. The growing demand for tailored support and specialised resources falls to inadequate funding, further complicating their role in ensuring schools can meet both financial and operational challenges effectively.

One interviewee working within a small primary school apart of a multi academy trusts calculated that their shortfall in SEND funding requirements they need was £65,000 for the 2024/2025 school year.

**“Our Health and safety issues are not met by estates funding”**

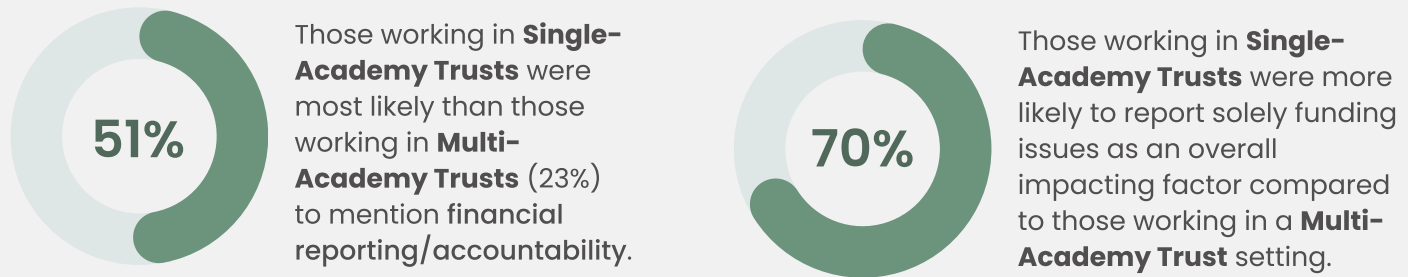
A major source of pressure stemmed from this reoccurring conversation, forcing difficult decisions of deciding which health and safety issues could be left unaddressed. This is highly stressful as the responsibility of balancing limited resources while ensuring a safe environment created a constant source of anxiety, further exacerbating their mental strain.

Instances of being unable to fund remedial work were described by interviewees. The Conditions Improvement Funding (CIF) requirement for schools to contribute towards the cost was hugely problematic in schools with old buildings. One interviewee from a central MAT team highlighted the financial strain of covering high health and safety costs, emphasising that it represents a substantial portion of an already limited budget, making it difficult to allocate funds elsewhere.

**“It’s funding issues at the level of health and safety that are difficult for me, because I sit in meetings, and I am asked why is this still ongoing? But at the end of the day, if something has a cost of £20,000 to put right, we do not have £20,000. If we don’t have this money, what is the solution?”**

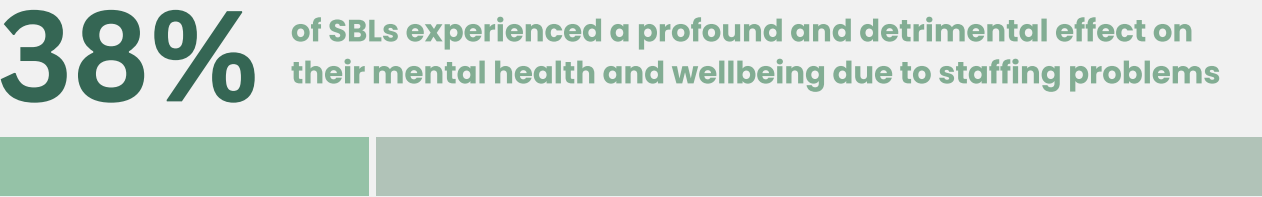
**(Primary MAT Central Team)**

A look at some significant figures:



# E) Problems with staffing

The survey found that:



**Staffing problems were acknowledged to be an issue, with the main concerns identified:**

- **Recruitment and retention issues**

This factor impacted the wellbeing and workload for all school business managers interviewed.

Support staff can find better paid, easier jobs outside of education. This increases pressure on school business mangers who must now:

Find temporary cover

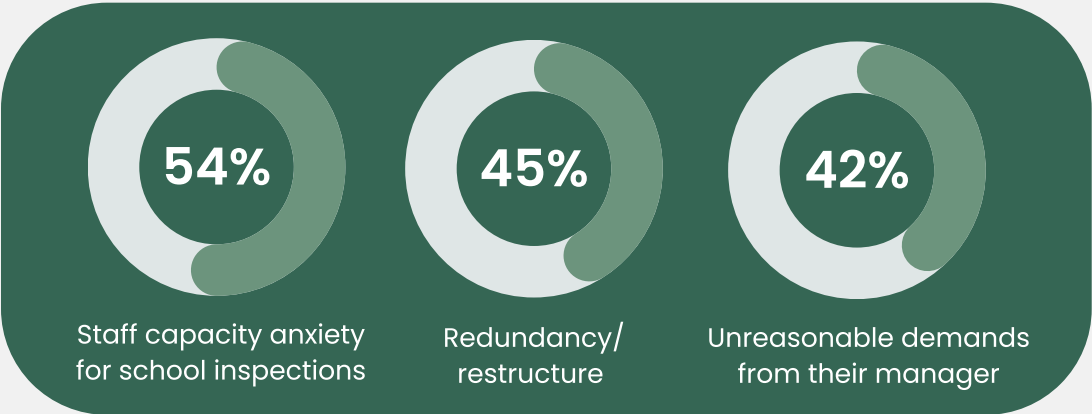
>>>

Fill any staffing gaps

>>>

Repeatedly initiate the recruitment and onboarding process for a succession of staff

Utilising your health and wellbeing service offering helps to attract and retain staff by offering absence protection and health services. These benefits can be highlighted in job descriptions to showcase your commitment to employee wellbeing.
- **Several additional differences were observed in the work-related factors affecting mental health and wellbeing, particularly in relation to the impact of staffing issues.**



# Further findings

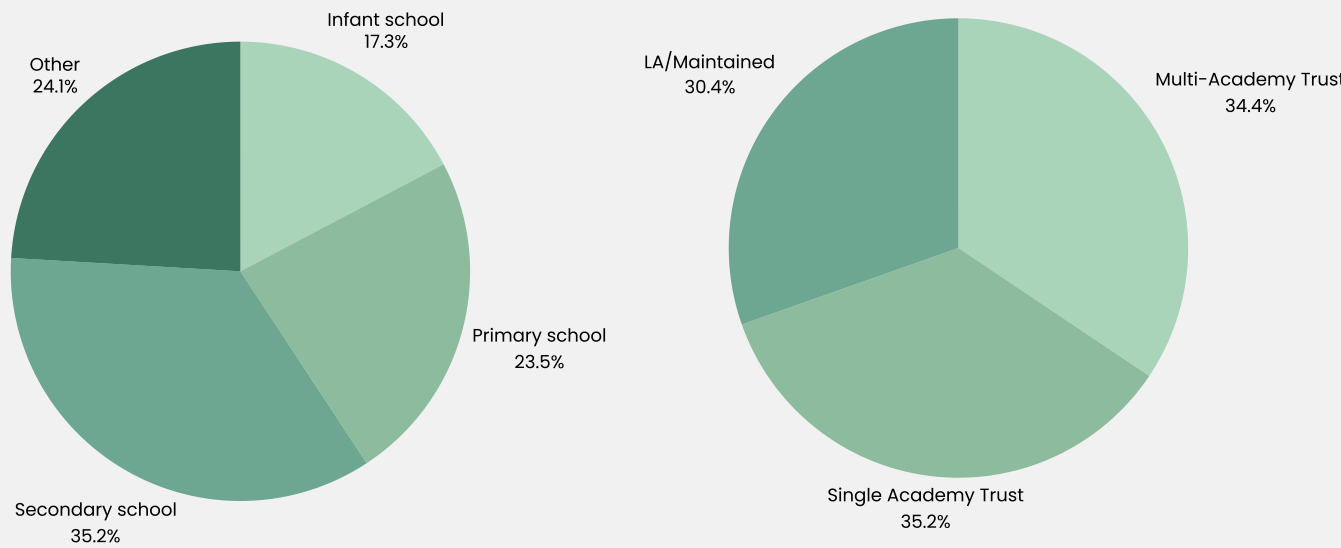
## Lack of work-life balance

**39%** of School Business Leaders recognise that maintaining work-life balance is a particular challenge for them

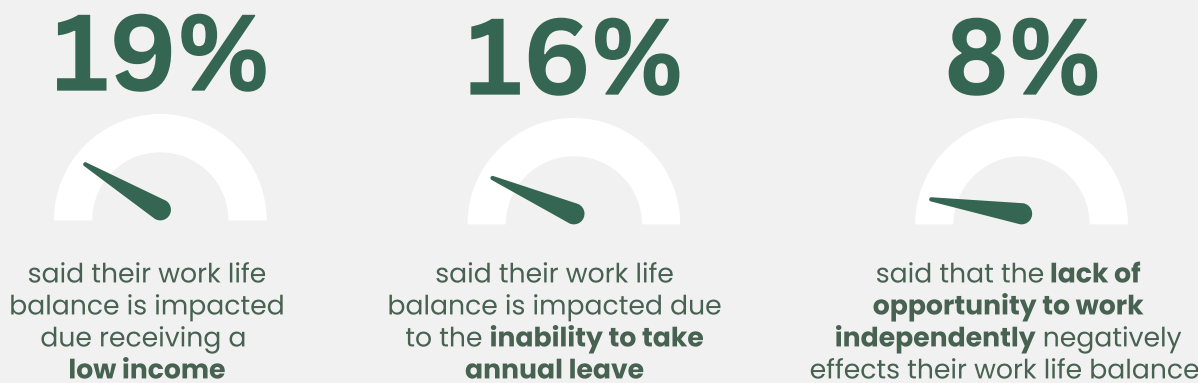


School Business Leaders acknowledged the negative impact of additional hours on their work-life balance but that it would be difficult to manage the role's demands without these.

## A detailed breakdown through category of school



## Contributing findings to a lack of work life balance for School Business Leaders working in Multi-Academy Trusts were:



# Section 4

## Trust Leaders People Strategy – Empowering School Business Leaders Survey



# Trust Leaders People Strategy – Empowering School Business Leaders Survey

To gain a broader understanding of the support available to School Business Leaders working within Multi-Academy Trusts (MATs), a separate survey was conducted specifically aimed to target the attention and collaboration from Trust leaders.

This research aimed to identify existing initiatives, assess areas for improvement, and explore strategies for fostering a more supportive working environment for SBLs. Trust leaders were invited to contribute their perspectives, which have been instrumental in developing a comprehensive Trust edition of the report.

## About the survey

The findings of this additional survey provide School Business Leaders with valuable insight into another perspective, shedding light on current awareness, understanding, and response to the challenges the SBL community are facing. It offers a clear view of what has been acknowledged, what actions are currently being taken, and what gaps remain in addressing these issues within Multi-Academy Trusts. By examining these findings, SBLs can better understand the level of recognition their concerns receive at the leadership level and identify the areas where further progress is needed.

## A collaborative approach

Through the impactful networks of several Education Mutual partner organisations, we were able to engage a wide range of trust leaders across the UK. Their participation allowed us to gather valuable insights into the current and ongoing actions being taken to enhance the wellbeing of the SBL community within their Trusts.

### With special thanks to:



Members of the Education Mutual Multi-Academy Trust Steering Group

Education Mutual Partner Organisations:



## Who are the findings of this survey for?

### ► Trust Leaders

The findings of this research provide trust leaders with valuable insights into the current and ongoing support available for School Business Leaders within MATs. By examining the survey results, Trust leaders can gain a clearer understanding of the existing landscape of support and identify areas for improvement. Additionally, the strategies and initiatives shared by other trust leaders offer practical ideas that can be incorporated into their own people strategy.

### ► School Business Leaders

The findings of this additional survey provide School Business Leaders with valuable insight into another perspective, shedding light on current awareness, understanding, and response to the challenges the SBL community are facing. It offers a clear view of what has been acknowledged, what actions are currently being taken, and what gaps remain in addressing these issues within Multi-Academy Trusts. By examining these findings, SBLs can better understand the level of recognition their concerns receive at the leadership level and identify the areas where further progress is needed.

## The Importance of a People Strategy

**“At MATA, we recognise that a forward-thinking people strategy is not just an operational concern — it’s a strategic imperative. This survey feedback provided via Trust Leaders shines a light on lived experiences, offering real insights that can guide policy, inform leadership decisions, and ultimately support better outcomes for SBL’s working within a Trust setting.**

Prioritising people is one of the central pillars of our vision at MATA, having hosted a number of event’s and webinars on this topic. Education Mutual’s research is extremely insightful, and allows trusts to understand where they are and how they can grow. It’s evidence-based, sector-specific, and deeply aligned with our mission to help MATs thrive through people-first leadership.”



**Matt McDermott**

Founder & Chair of Advisory Board  
Multi-Academy Trust Association (MATA)

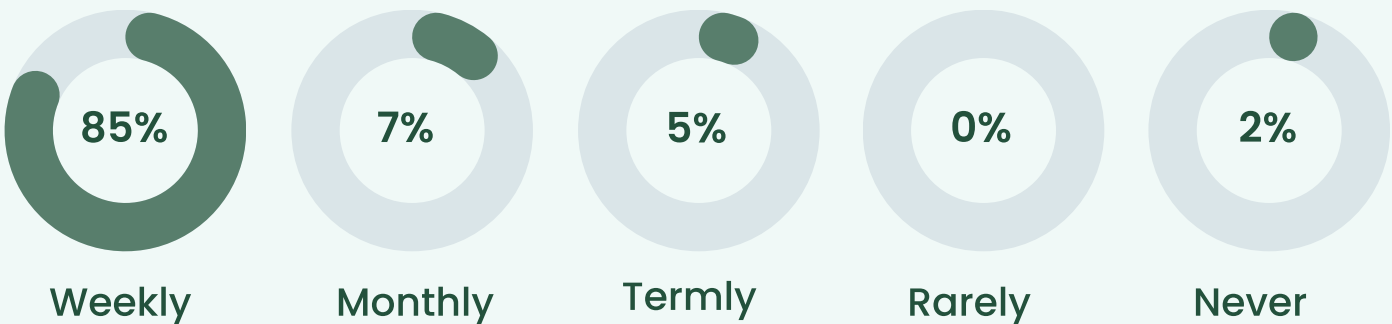


1) As a Trust leader, do you feel that you have a good understanding of the day-to-day role of your School Business Leader?

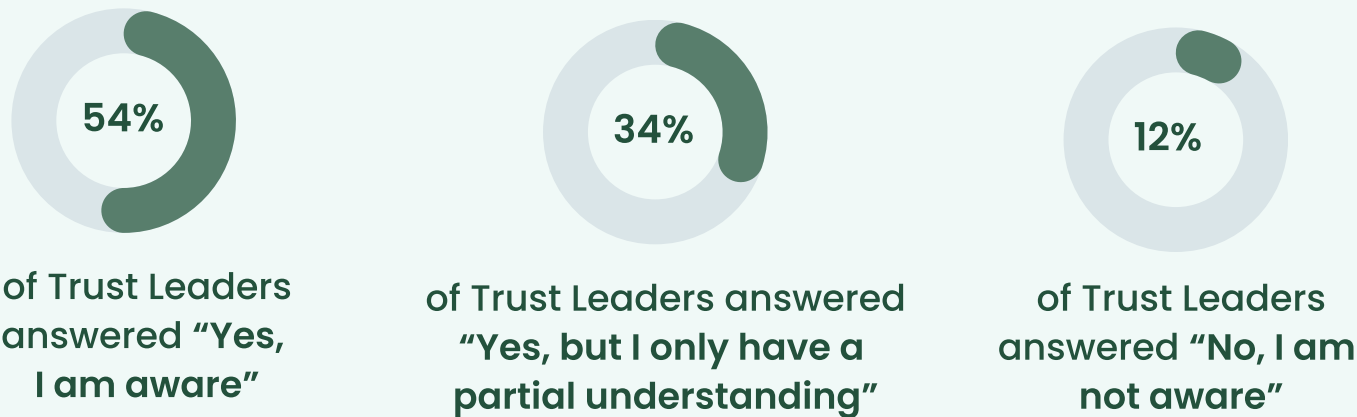
The survey found that:



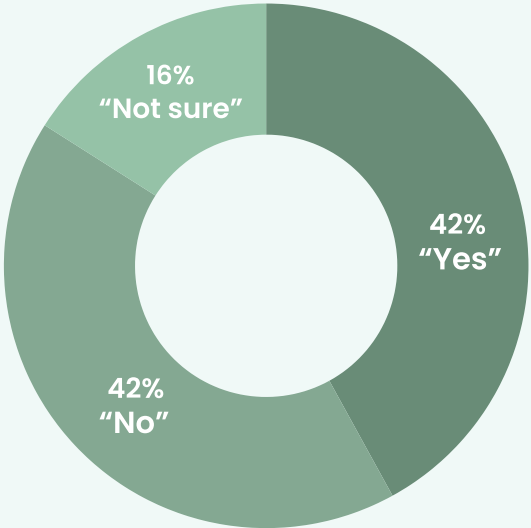
2) How frequently do you personally engage with the School Business Leaders within your Trust?



3) Are you aware of the current state of your SBLs mental health and wellbeing?



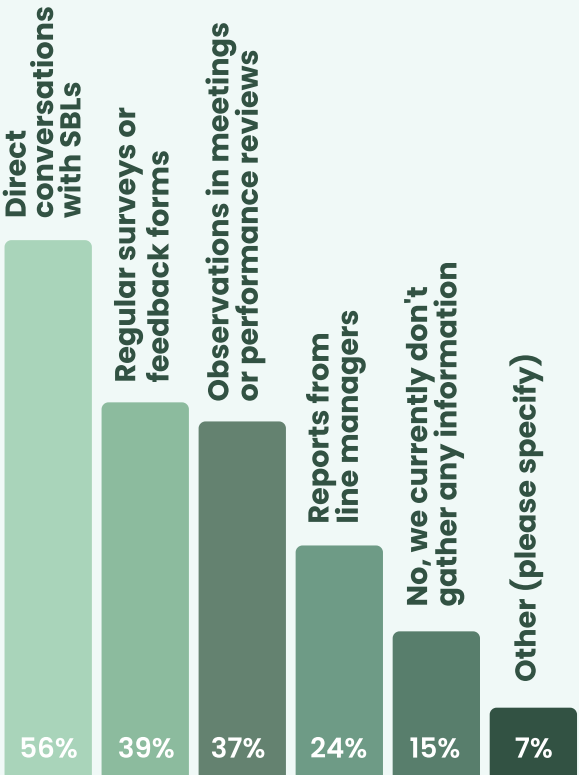
4) Does your Trust have any formal processes in place to regularly assess the wellbeing of SBLs?



If answered 'yes', please share which processes you have in place

- "Regular check ins and 1:1's"
- "We undertake termly and annual staff wellbeing surveys"
- "Each school has a Wellbeing champion"
- "We meet daily as part of SLT and informally check in, in huddles"

5) How do you currently gather information about the wellbeing of your staff, specifically your SBLs? (Select all that apply)

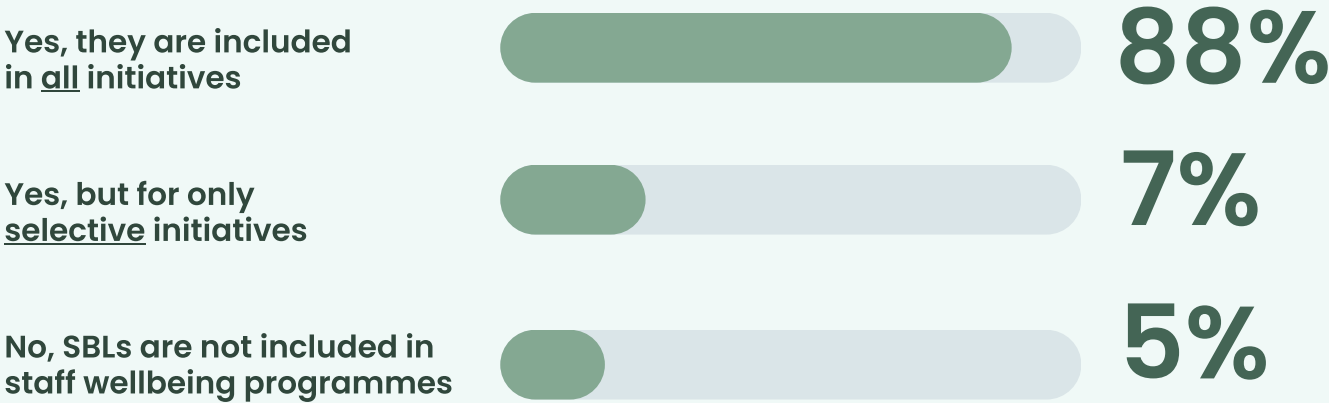


- "I share an office with our SBL so I remain in regular conversation"
- "Still going through the information that is offered so not clear yet to the extent"
- "Through those solo 1:1 conversations"
- "External wellbeing audits"
- "Suggestion boxes in the staff room"

6) As a Trust leader, what specific actions or initiatives does your Trust currently have in place to support the mental health and wellbeing of SBLs? (Select all that apply)



7) Are SBLs included in any wider staff wellbeing initiatives offered by the Trust?

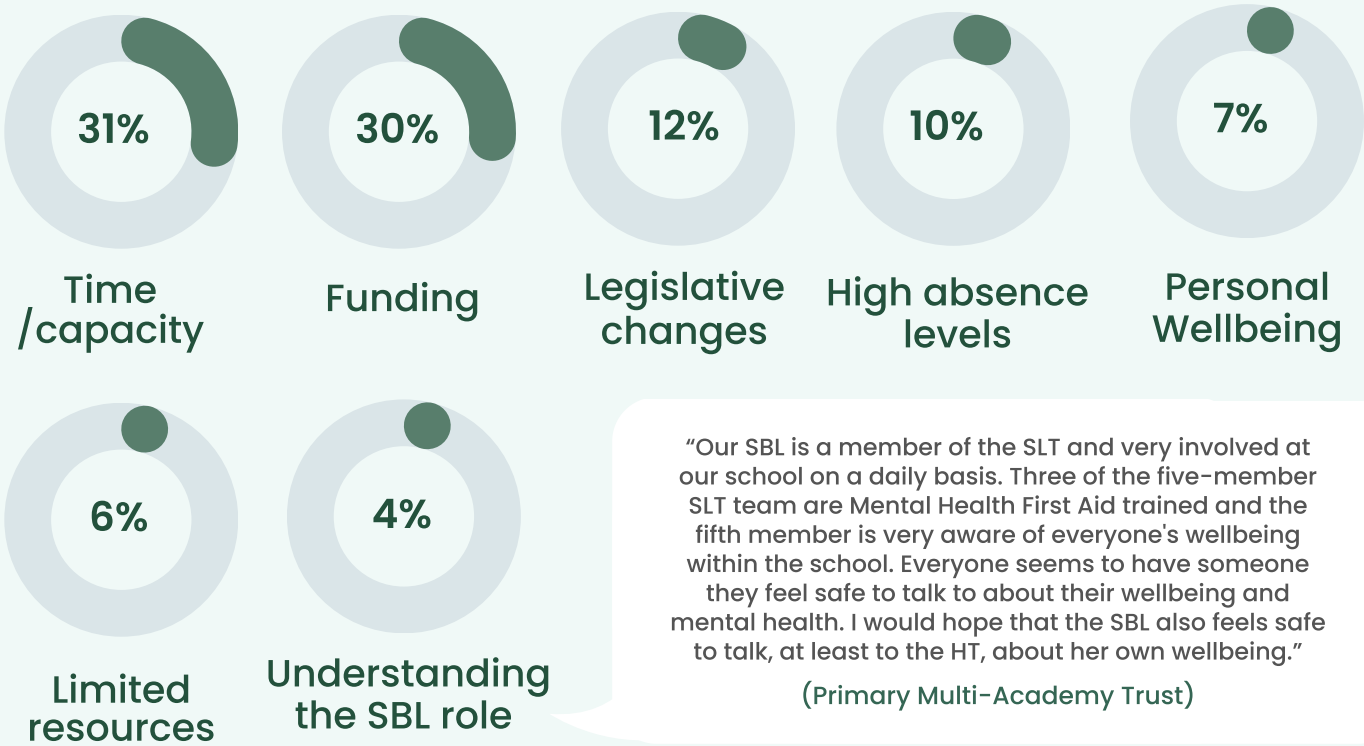


8) What additional support and resources do you believe would be most beneficial in improving the wellbeing of your SBLs?

Here are the top 10 most common initiatives that trust leaders have either implemented or wish to implement within their Multi-Academy Trusts — none of which were listed by Education Mutual as a suggestion.



9) Are there any challenges you're facing in your role as a Trust leader, to ensure the wellbeing of your School Business Leaders? (Select all that apply)



10) Do you have any additional comments or suggestions regarding the wellbeing of SBLs within your Trust?

“The Trust should collect and review information given by the SBLs”

“Could the SBLs from across the trust have regular mutual support meetings?”

“Suggestion for SBL working group to help identify and address common issues across the Trust”

“Culture is key in wellbeing. Having the confidence to speak up and not feel a voice may be dismissed”

“I think the profile of SBL varies from school to school depending on the SLT. Centrally managed staff are well supported”

“There is a high expectation of the role, it can be difficult to achieve everything needed on time”

# Section 5

## Conclusions and recommendations



## Our Conclusions

### Funding

Funding has become a critical issue, with respondents identifying financial constraints as one of the most problematic aspects of their roles. Trust leaders also feel the impact, as they are forced to stretch and reallocate resources, often at the expense of their preferred strategies. This strain creates ongoing pressure, as there are limited options to hire additional support staff or seek expert consultancy services to alleviate the burden.

### Service usage

Despite having access to various support services provided by their multi-academy trust, the report's findings make it clear—the SBL community is not utilising them effectively. This underuse is often driven by persistent, recurring barriers that keep them trapped in a cycle of stress and inaction. By actively engaging with these resources, SBLs can adopt practical self-care strategies, and with greater encouragement, bridge this gap—creating a profoundly positive impact on the entire SBL community.

It's important to implement the benefits included in your Education Mutual membership. If you're already a member, you can easily get started by visiting the following link to request a service <https://www.educationmutual.co.uk/contact-us/>

### The personal wellbeing challenges of Trust Leaders

Our research highlights another broad issue—Trust leaders themselves are also struggling. They face significant external pressures beyond their control, which create a domino effect, negatively impacting the wellbeing of their internal SBL community. Many are actively working to address the 'small wins' within their setting, recognising that by improving their own wellbeing can foster a more supportive staff culture.

### Special Educational Needs and Disabilities

SEND has become an ongoing and escalating challenge within the multi-academy trust setting, placing increasing pressure on both Trust leaders and SBLs. Their role in particular means that SBLs are at the forefront of these pressures, juggling financial constraints, staffing shortages, and logistical challenges while striving to provide equitable educational opportunities for all students.



## Our Conclusions

### Funding

When I joined CST, I took oversight of our finance and operations professional community which at that point was our biggest with around 700 members. Three years on, we now have discrete finance, operations, and people and culture communities of over 5,500 (or 3,500 individuals when you control for those who have joined more than one). They are some of our most active and engaged communities, regularly reaching out to one another, supporting, sharing, learning. Our members tell us all the time that this organic collaboration is making a huge difference – not least in simply feeling seen. These professional networks (whether CST's or not) will become more crucial as we face incoming challenges together, and should form a foundational part of colleagues

### Workload

With 80% saying workload will only be manageable through recruiting more staff but funding tighter than ever, we need to think creatively. Trusts have an opportunity; there is scope for better processes, increased efficiency, and removal of duplication. Trusts might want to consider reviewing their operations alongside the OpEx for Education Framework published by ISBL (and supported by CST). We should also think creatively about how we work – the report shows there is appetite for additional flexibility, and while this is challenging for teaching staff who need to be in their classrooms teaching, there may be unexplored options for business leaders.

### Funding

In the current climate, it's impossible not to point to funding as a necessary intervention to support the sector – not just to fund mental health and wellbeing or recruitment and retainment initiatives, but generally; those working across finance and operations at trust and school level carry the weight of trying to balance the books, taking tough decisions on so-called 'efficiencies' we know are impossible to find. The stresses and strains that causes for staff – particularly those overseeing budgets – should not be underestimated.

### Changemakers

One of the many benefits of a trust is its ability to act as a protective structure. As the employer, trusts can make great strides in putting into action evidence-informed systems to promote and support good mental wellbeing. Too often, we seek permission or for a leader with all the right answers. But we are those leaders. There is nobody waiting in the wings with a perfect solution; we are already centre stage, doing the best we can, which this report shows is already working for most. We can do this, together.



# Our Recommendations - For SBLs

## For School Business Leaders:

To help navigate these challenges, we've outlined a range of strategies and suggestions below, informed by recent research. We hope these ideas will not only address some of the key issues raised but also provide practical solutions to enhance your efficiency, wellbeing, and overall impact in the role.

### Can you join local, national groups and support networks of SBLs, where experiences can be shared and issues discussed?

Many organisations, both locally and nationally, can offer support in overcoming feelings of isolation. For a comprehensive list of available resources, please refer to the 'Signposting to Useful Organisations and Available Support' section of this report.

#### Strengthen relationships across your Trust

Building strong connections, whether with the Central Team or your Head Teacher, is key. Does your Multi-Academy Trust have role-specific groups? If not, consider starting one— even a WhatsApp group for local SBLs could be a valuable resource.

### Utilise the services provided to prioritise your own mental and physical health

For yet another year, the utilisation of services within the SBL community remains notably low compared to the wide range of services available via your school. Prioritising self-care is essential—take the time to explore the wellbeing services that align with your lifestyle and needs to help reignite your energy in order to regain your spark.

### Where possible, can you work remotely?

It is all too easy to forget about your own needs when in a busy role helping others – it must be an equal priority. Working remotely offers significant benefits, particularly in maintaining focus and productivity. In schools, you're often facing a constant stream of impromptu requests such as, "Can you just..." or "Are you able to...?" These can disrupt your workflow and make it challenging to focus on your own critical, time-sensitive tasks.

# Our Recommendations For Trust Leaders

## Encourage multiple methods of wellbeing data collection

It is crucial for Trust leaders to encourage and provide a comprehensive and dynamic view of their SBL community. Regular check-ins, implemented through different methods, help keep the process fresh and engaging, preventing burnout from repetitive surveys or routines. This approach not only strengthens leaders' awareness of their staff's wellbeing but also allows them to adapt their strategies in real-time.

## Fully integrate SBLs into any Trust wellbeing initiatives

Trust leaders should include SBLs in all wellbeing initiatives because they are vital to the smooth operation of the trust. Excluding them contributes to feelings of isolation. They play a key role in maintaining the trust's functionality, so ensuring their wellbeing is catered for is essential. By integrating them into wellbeing efforts and standardising these processes across the trust, leaders ensure consistency of inclusivity.

## Lead by example and focus on your own Self-Care

The findings from the Trust Leader survey highlight that it's vital for leaders to set aside time and focus for their own wellbeing. It's easy to become consumed by the demands of the role, and external factors beyond your control can further intensify stress and strain. Ultimately, when Trust leaders invest in their own health, it creates a ripple effect that supports the wellbeing of the entire organisation. This focus creates a collaborative environment to share initiatives, methods, and ideas to benefit everyone within the trust.

## Added value in absence protection providers

Ongoing staffing challenges and the wider impacts of staff absenteeism are causing a strain on resources, disrupt trust functionalities, and affect the overall wellbeing of staff. To combat these challenges, select a provider offering comprehensive health and wellbeing services within your budget. Education Mutual, for example, provides services like Flu Vaccines, 24/7 GP Access, Counselling, and Physiotherapy, enhancing staff wellbeing and ensuring long-term budget certainty while mitigating absenteeism to improve retention.

## Our Recommendations - For the Wider Education Sector

### Accurate and detailed job descriptions

This approach is mutually beneficial. It enables SBLs to clearly understand what falls within their remit, giving them the confidence to decline tasks outside their responsibilities. Additionally, it helps other staff members gain a better understanding of the SBL role and the scope of their duties.

### The introduction of role adjustments

Both survey respondents and interviewees indicated that SBLs found working from home more beneficial than being in the office, citing factors such as fewer distractions. When feasible, offering the option to work from home could significantly improve productivity, as SBLs can manage their time more effectively and work in an environment that suits their personal needs.

### Remote Working Opportunities

Both survey respondents and interviewees indicated that SBLs found working from home more beneficial than being in the office, citing factors such as fewer distractions. When feasible, offering the option to work from home could significantly improve productivity, as SBLs can manage their time more effectively and work in an environment that suits their personal needs.

### Calendar Improvements

The SBL community would greatly benefit from engaging in proactive communication with their senior leadership team to collaboratively map out the annual calendar. By clearly outlining their busiest working periods, SBLs can help ensure that additional tasks or responsibilities are not assigned during these peak times, thus preventing excessive workload and alleviating unnecessary pressure.

# Section 6

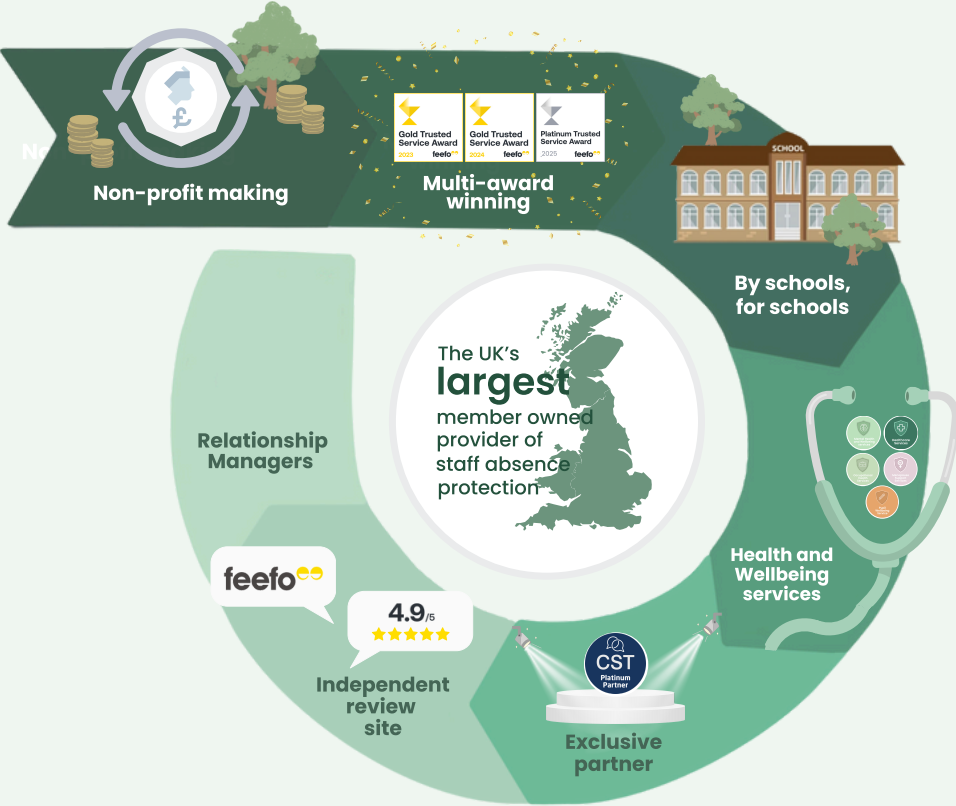
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# Resources

# Useful Resources



## Staff Absence Protection for Schools and Trusts



Since 2018, Education Mutual has been transforming staff absence protection with an innovative, non-profit making approach that prioritising flexibility of cover and welling support.

We're dedicated to providing schools and academies with the guidance, resources, and protection they need to excel. Our 'Trusted Friend to the Sector' commitment offers a solution to safeguard your school to prevent and reduce staff absences.

Our multi-award-winning service delivers budget certainty and includes complimentary health and wellbeing services to support to reduce and prevent absences.

## Supporting Multi-Academy Trusts:



We have published three resources which you may find helpful:

Created in collaboration with Education Support, offering information, practical advice, and useful tools to support your mental health and wellbeing.



### Leadership Development

We provide a comprehensive support service specifically tailored to Trusts, designed to enhance the professional development of Trust Leaders, COOs, CFOs, and other employees.



### Staff Reputation Legal Protection

This service covers the initial legal costs to help you take swift and effective action on damaging statements made, arising from staffs professional duties.



The below healthcare services are included in all Education Mutual memberships:

- |                               |                                  |                                   |                                  |
|-------------------------------|----------------------------------|-----------------------------------|----------------------------------|
| 24/7 GP Service               | Stress Management                | Supporting Staff in the Workplace | Neurodiversity Training          |
| Flu Vaccines                  | Face-to-face Counselling         | Menopause Counselling             | Occupational Health Assessments  |
| Physiotherapy                 | Mental Health First Aid Training | Navigating your Personal Journey  | New Employee Assessments         |
| Balancing Parenthood          | Grief and Resilience             | Menopause Blog                    | Occupational Health Support Line |
| Nurse Support Service         | Financial Wellbeing Coaching     | Symptoms Tracker                  | Occupational Health Hub          |
| Surgical Assistance Programme | Men's Mental Health              | Guidance for Partners             | Deloitte Legal Services          |



# Useful Resources



## School Resource Management

Information, tools, training, and guidance to help schools and trusts save money on day-to-day costs.

**The department is committed to working with the sector to enable excellent school resource management in all schools and academy trusts. Our strategy sets out our vision and approach to help build an even stronger school system.**

The tools and guidance on this page will help schools and academy trusts get the best value from their resources and therefore maximise the impact on pupil outcomes. They are free and available to all state funded schools.

### Contents

- [Supporting excellent school resource management](#)
- [Accessing SRM support](#)
- [Understanding your data](#)
- [Support managing your workforce](#)
- [Getting the best value from your non-staff spend](#)
- [Managing your school estate](#)
- [Getting the most out of digital technology](#)
- [Providing effective governance and challenge on SRM](#)
- [School resource management: impact, evaluation and research findings](#)

[Home](#) > [Education, training and skills](#) > [School and academy financial management and assurance](#) > [Local authority schools financial reporting and assurance](#)

## Key topics

Explore Education Mutual’s key selections of the Department for Education’s offerings within their School Resource Management collection. You can learn more about the DfE’s approach for the next 3–5 years in their strategy, “School resource management: building a stronger system”. You can also access their free offer of training and support aimed at School Business Professionals (SBPs), school leaders and boards, and a directory of SBP networks.

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### [School business professionals: training and development](#)

11 February 2025    Guidance

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### [School resource management self-assessment checklist](#)

20 January 2025    Guidance

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### [School improvement support](#)

22 January 2025    Collection

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### [DfE’s benchmarking tools for schools improve financial management](#)

19 December 2022    Case study

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### [Integrated curriculum and financial planning \(ICFP\)](#)

24 January 2025    Guidance

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Useful Resources

# JIGSAW24

## Supporting Educators with Technology.



The Education team at Jigsaw24 understands the demands of UK schools. As Apple Authorised Education Specialists, we believe in leveraging technology to enhance teaching, learning, and wellbeing.

**"Technology isn't just about efficiency – it's a tool for wellbeing, balance, and joy in education. Let's use it to support ourselves as much as we support our students."**

**Nicola Foote**  
Professional Development Consultant  
✉ [education@jigsaw24.com](mailto:education@jigsaw24.com)

### Technology Tools for Reducing Workload

#### AI for Mental Wellness & Productivity

An AI-powered wellbeing assistant designed to provide educators with empathetic support, mental wellness guidance, and practical strategies – available anytime for a moment of calm.

#### AI-Powered Meeting & Note-Taking Assistant

This AI-driven app records, transcribes, writes notes, captures action items, and generates summaries in real-time, ensuring you never miss a detail. Ideal for staff meetings, CPD sessions, and lesson reflections.

#### TeachmateAI – Save Time & Reduce Admin Workload

TeachmateAI automates lesson planning, report writing, and presentation creation—saving educators up to 10 hours a week. Now featuring the Wellness Check-in Tool, designed to support mental wellbeing alongside workload reduction.

TeachmateAI Wellness Check-in  
✉ Contact Jigsaw at [education@jigsaw24.com](mailto:education@jigsaw24.com) to set up a free trial

### Technology Tools for Productivity & Collaboration

#### Canva – Design, Organise, and Collaborate Effortlessly

Utilise Canva's AI-powered design tools to streamline planning, create engaging classroom visuals, and organise ideas. Its real-time collaboration features enhance teamwork in both classroom and administrative tasks.

✉ [Canva for Education](#)

#### Smart Transcription & Voice Notes with Otter.ai

Capture meetings, lessons, and ideas hands-free with automatic transcription. Use voice notes instead of typing to reduce screen fatigue and boost efficiency.

✉ [Otter.ai](#)

### Technology Tools for Wellbeing

#### Quick Wins for Digital Wellbeing

The below tools and strategies help educators find balance between work, screen time, and mental wellness:

- Set **"Do Not Disturb"** hours on your phone to create boundaries between work and home life.
- Use **guided breathing apps** like Calm or Balance to reset between lessons.
- Schedule **"no-screen" time** before bed to improve sleep and reduce digital fatigue.
- Batch **admin tasks** (emails, marking, meetings) to free up cognitive load.
- Try **Freeform or Apple Notes** to visually organise tasks and reduce overwhelm.

### Mindfulness & Breathing Apps

Apps like **Calm, Headspace, and Balance** offer **guided meditation, breathing exercises, and focus techniques**. Balance even offers a **free 12-month trial**.

✉ [Calm](#)

✉ [Headspace](#)

✉ [Balance](#)

### Track and Notice: Your Digital Wellbeing

- Check your **device usage stats** by going to **Settings > Screen Time**
- Review your **Pickups** (how often you check your phone) and compare with a colleague.
- Create a personal reflection space with Apple's **Journal app** (iOS 17+), adding notes, images, and insights.

# Signposting to useful organisations and available support



## Education Mutual

The UK's largest member-owned provider of staff absence protection for Schools and Trusts

<https://www.educationmutual.co.uk/>



## Association of School and College Leaders (ASCL)

A professional association and trade union for all school, college and trust leaders

<https://www.ascl.org.uk/>



## Confederation of School Trusts (CST)

A national organisation and sector body for school trusts in England advocating for, connecting and supporting executive and governance leadership

<https://cstuk.org.uk/>



Department for Education

## Department for Education (DfE)

The Department for Education is responsible for children's services and education, including early years, schools, higher and further education policy, apprenticeships and wider skills in England

<https://www.gov.uk/government/organisations/department-for-education>



## Institute of School Business Leadership (ISBL)

A membership organisation offering sector-endorsed professional standards and development opportunities for its professional community and their institutions through a portfolio of quality-assured qualifications, training, resources, research and events

<https://isbl.org.uk/>

## JIGSAW24

## Jigsaw24

A leading B2B IT solutions provider helping businesses, educational institutions, and public sector organizations to improve their performance through better sustainable technology and expert services, support and sales.

[www.jigsaw24.com](http://www.jigsaw24.com)



## Multi-Academy Trust Association (MATA)

A free to join association which has membership across 600+ Trusts across England. MATA focuses on core pillars when supporting Trust leaders which are: AI, Growth, Finance and Fundraising, Estates and People.

<https://www.matassociation.org/>



## National Association for Head Teachers (NAHT)

A membership organisation which represents school leaders working in the education sector

<https://www.naht.org.uk/>



## SBL Connect

A grassroots movement to connect and represent School Business Leaders

<https://www.sblconnect.com/>



Please contact Education Mutual for inquiries into staff absence protection options and wellbeing support available:

☎ 01623 287840    ✉ [learnmore@educationmutual.co.uk](mailto:learnmore@educationmutual.co.uk)



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# Section 7

## Appendices

### Appendices

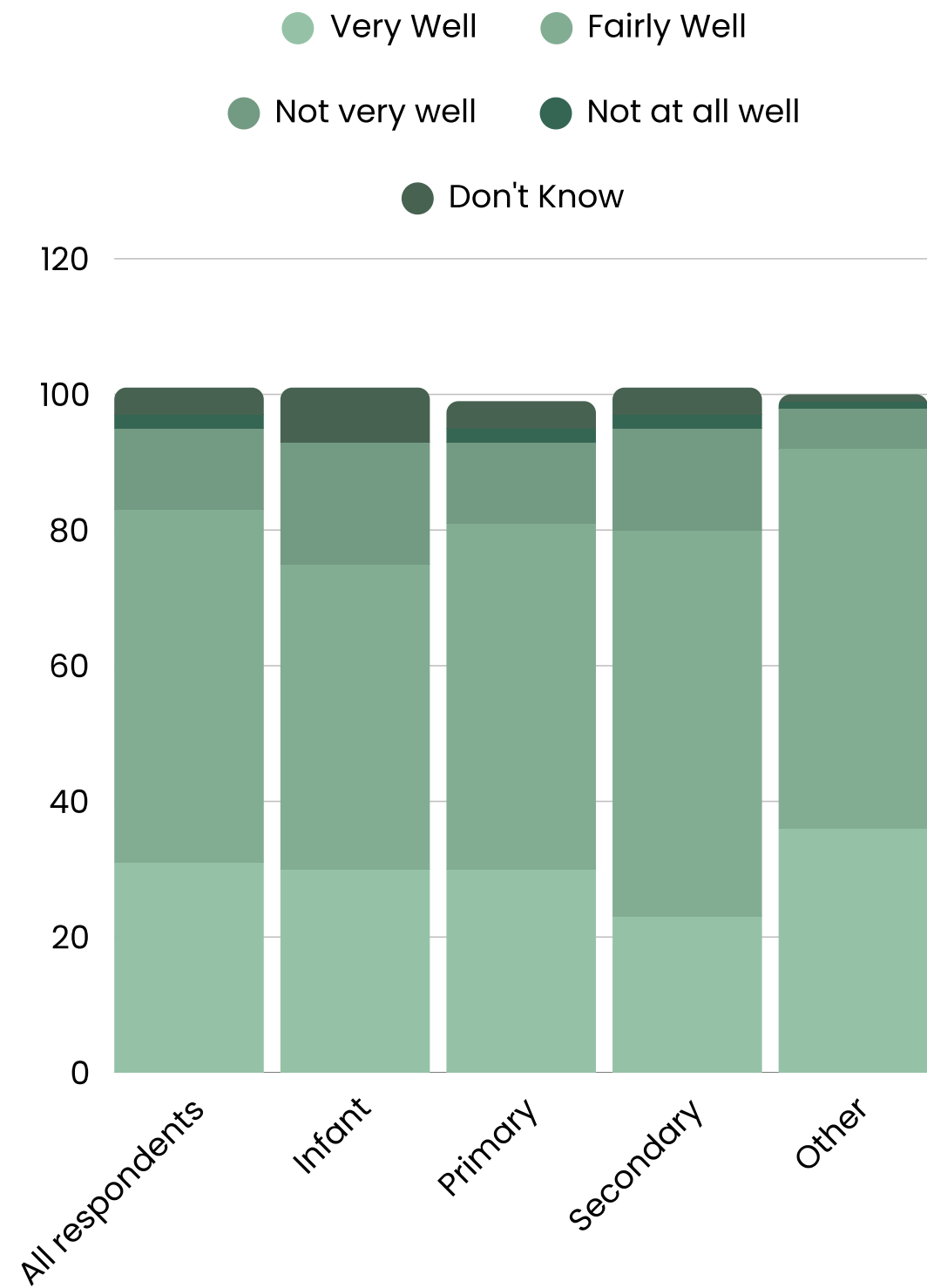
**Appendix 1:** Base: All respondents (n=715)

Work-related factors impacting on mental health and wellbeing

Service	Multi-Academy Trust (MAT)	Single-Academy Trust (SAT)	Local Authority/ Maintained
Excessive workload	62%	72%	64%
Funding Issues	41%	70%	60%
Lack of understanding from others about my role	44%	53%	57%
Problems with staffing	38%	47%	50%
Long working hours (unpaid)	43%	47%	43%
Lack of work/life balance	39%	44%	38%
Inequitable pay	29%	26%	37%
Financial reporting/accountability	23%	51%	32%
Provision for pupils with special needs	16%	28%	31%
Government legislation/compliance	21%	33%	29%
Problems with pupils' parents	16%	16%	29%
Inspections	17%	23%	25%
Low income	19%	16%	24%
Not able to take annual leave	16%	33%	23%
Poor pupil behaviour	10%	5%	11%
Redundancy/restructure	8%	9%	10%
Unreasonable demands from manager	11%	16%	7%
Safeguarding	8%	12%	9%
Lack of opportunity to work independently	8%	2%	7%
Lack of trust from manager	9%	2%	5%
Addressing the educational disadvantage gap	4%	7%	5%
Bullying by colleagues	3%	2%	3%
Teacher strikes	3%	2%	3%
Discrimination	2%	3%	1%
None of these	8%	2%	4%

Appendix 2:

Overall perception of support for employees who experience problems with mental health and wellbeing, total and phase



Base: All respondents (n=715)

Appendix 3:

Mental health and wellbeing services provided and used

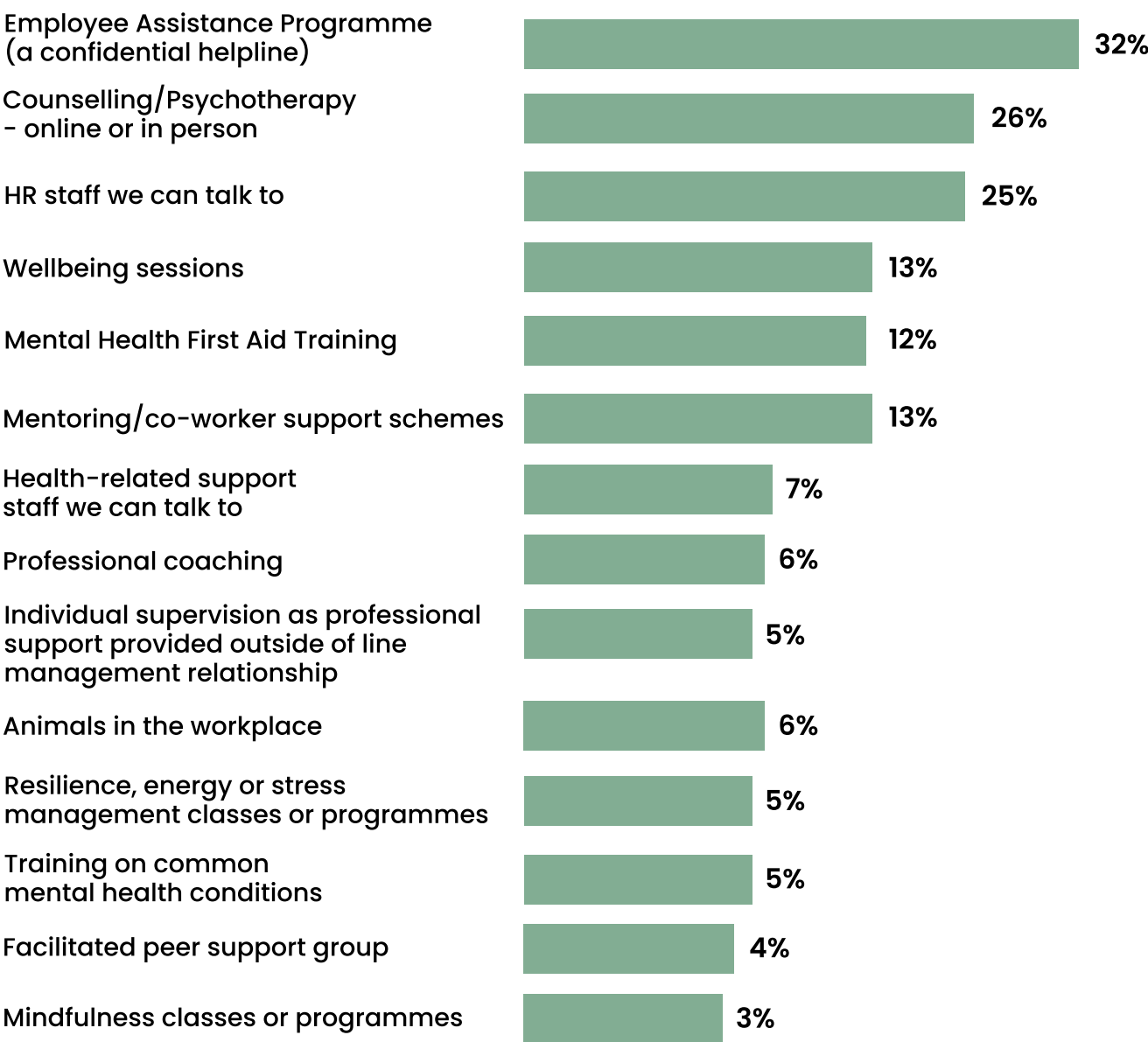
Base: All respondents (n=715)

Service	Multi-Academy Trust (MAT) - Provided	Multi-Academy Trust (MAT) - Used
Employee Assistance Programme (a confidential helpline)	62%	10%
Counselling/Psychotherapy - online or in person	52%	10%
Mental Health First Aid Training	42%	6%
HR staff we can talk to	51%	20%
Union people we can talk to	25%	2%
Wellbeing sessions	29%	8%
Health-related support staff we can talk to	19%	3%
Mentoring/co-worker support schemes	16%	4%
Individual supervision as professional support provided outside of line management relationship	16%	5%
Animals in the workplace	14%	4%
Training on common mental health conditions	15%	3%
Professional coaching	14%	5%
Exercise classes, groups or programmes	6%	3%
Mindfulness classes or programmes	8%	2%
Facilitated peer support group	7%	4%
Resilience, energy, or stress management classes or programmes	5%	2%
Massage or relaxation classes or programmes	4%	1%
None of these	7%	35%



Appendix 4:

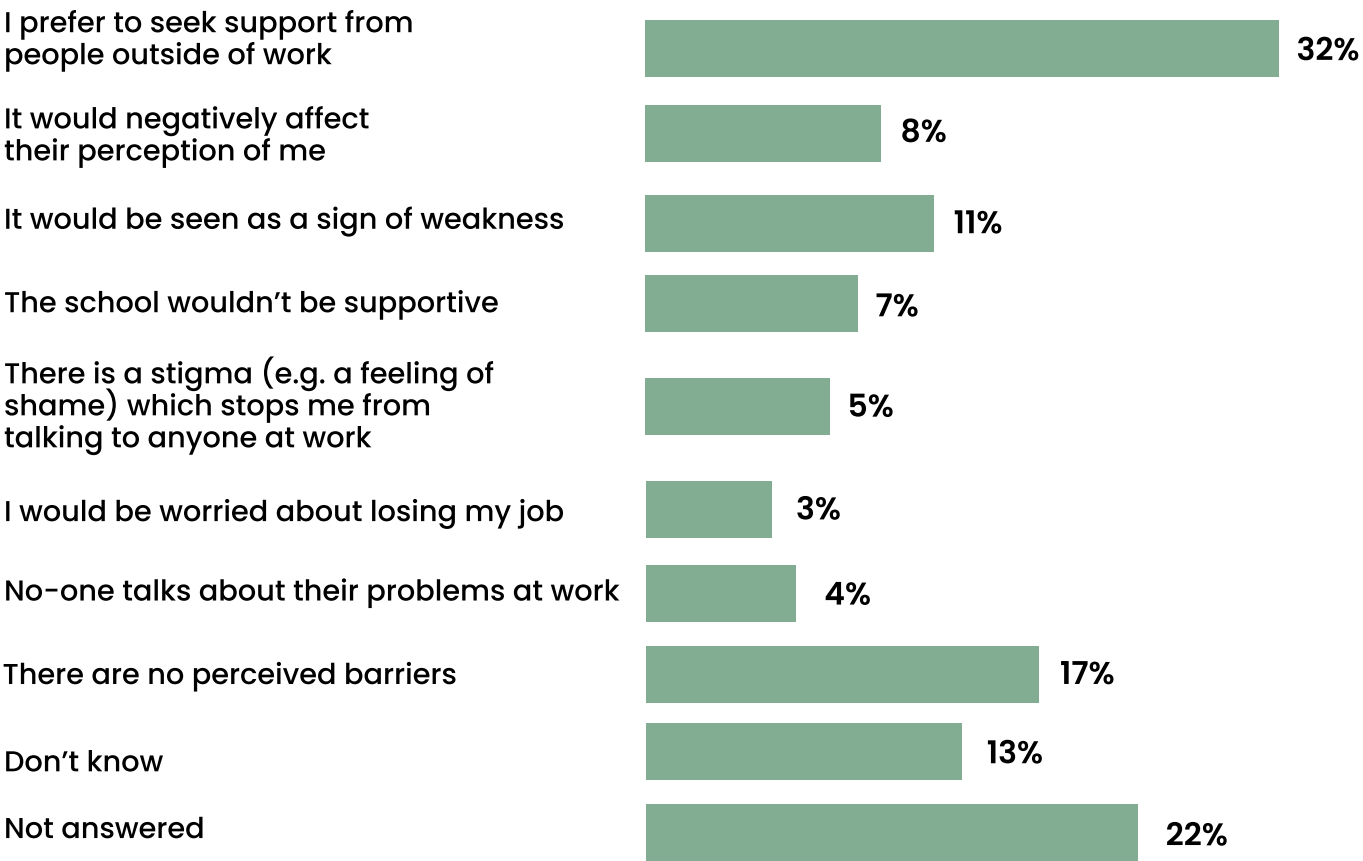
Top 3 services of most benefit when dealing with work-related factors impacting upon wellbeing – top 10 mentions



Base: All respondents (n=715)

Appendix 5:

Barriers to using or accessing services that were available



Base: All respondents (n=715)

Appendix 6:

Methodology

This research study investigated the wellbeing needs of School Business Leaders working in state-funded primary, secondary and special schools in England and Wales.

It aimed to understand:

- What are the work-related factors which have an impact on the mental health and wellbeing of School Business Leaders?
- Which types of mental health and wellbeing support do School Business Leaders currently use? Which are of most benefit, in tackling these work-related factors?
- Overall, how well do SBLs perceive the mental health and wellbeing support provided by their workplace?

A mixed-methods design was used to answer the research questions.

This involved:

- 715 online survey responses from SBLs working in schools in England and Wales. The survey was open for completion during the period Monday 23rd September until Friday 18th October 2024. Incentives were offered to take part.
- 5 telephone, or online, depth interviews with SBLs or School Business Managers, to further explore some of the issues raised in the survey.

Details of the respondents who took part in the online survey and the interviews are shown below.

Online survey sample (all tables below based on 514 respondents)

Appendix 6 – Table 1 – Job Title

	Number of respondents	Proportion
School Business Manager/Director	517	72%
Office Manager/Director	65	9%
Office Support Staff	39	5%
Bursar	39	3%
Finance Manager/Director	19	3%
CEO/CFO	15	2%
Operations Manager/Director	13	2%
Headteacher/Principal, Deputy or Assistant Head Teacher/Principal	13	2%
HR Manager/Director	11	2%
Facilities Manager/Director	2	0%

Appendix 6 – Table 2 – Tenure

	Number of respondents	Proportion
0 – 2 years	146	20%
3 – 5 years	180	25%
6 – 10 years	184	26%
11 – 20 years	142	20%
21 – 30 years	52	7%
31+ years	11	2%
Not answered	3	1%

Appendix 6 – Table 3 – Respondent Gender

	Number of respondents	Proportion
Male	48	7%
Female	665	93%
Transgender	–	–
Non-binary	–	–
Prefer not to say	2	<1%

Appendix 6 – Table 4 – Respondent Age

	Number of respondents	Proportion
Less than 20	1	0%
20 – 24	–	–
25 – 29	13	2%
30 – 34	25	3%
35 – 39	50	7%
40 – 44	88	12%
45 – 49	121	17%
50 – 54	188	26%
55 – 59	144	20%
60 – 64	67	9%
65+	9	1%
Prefer not to say	9	1%
Not answered	3	1%

Appendix 6 – Table 5 – Tenure

	Number of respondents	Proportion
0 – 2 years	146	20%
3 – 5 years	180	25%
6 – 10 years	184	26%
11 – 20 years	142	20%
21 – 30 years	52	7%
31+ years	11	2%
Not answered	3	1%

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	Number of respondents	Proportion
Male	48	7%
Female	665	93%
Transgender	–	–
Non-binary	–	–
Prefer not to say	2	<1%

Appendix 6 – Table 7 – Respondent Age

	Number of respondents	Proportion
Less than 20	1	0%
20 – 24	–	–
25 – 29	13	2%
30 – 34	25	3%
35 – 39	50	7%
40 – 44	88	12%
45 – 49	121	17%
50 – 54	188	26%
55 – 59	144	20%
60 – 64	67	9%
65+	9	1%
Prefer not to say	9	1%
Not answered	3	1%

Appendix 6 – Table 8 – Respondent Ethnicity

	Number of respondents	Proportion
Any Asian Background	12	2%
Any Black Background	3	<1%
White – English, Welsh, Scottish, Northern Irish or British	670	94%
White – Irish	5	1%
White – Gypsy or Irish Traveller	–	–
White – Roma	–	–
White – Any other White Background	11	2%
Any ethnic group – (includes Arab, Mixed and other)	6	1%
Prefer not to say	18	4%

Appendix 6 – Table 9 – Region

	Number of respondents	Proportion
North East	83	12%
North West	149	21%
Yorkshire and Humber	50	7%
East Midlands	50	7%
West Midlands	65	9%
East of England	80	11%
London	28	4%
South East	128	18%
South West	71	10%
Wales	11	2%



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