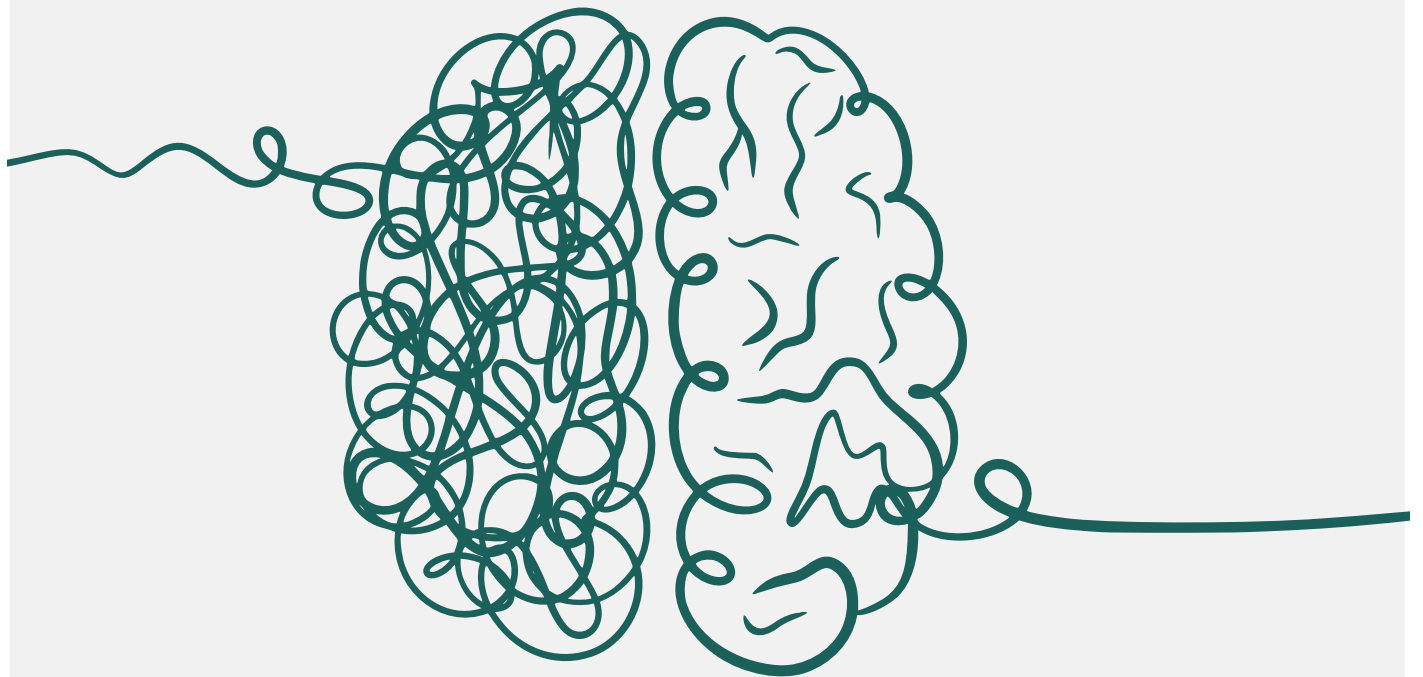




Multi-Academy Trust School Business Leaders Wellbeing Index 2026

May 2026



Acknowledgements

Education Mutual extends our sincere thanks to the **Confederation of School Trusts (CST)** for their significant contributions to the multi-academy trust edition of this research. Their ongoing support and strong engagement with their networks help to drive change across the education sector. We appreciate their collaboration and shared commitment to improving wellbeing within the trust community.

We are grateful to the **Department for Education (DfE)**, whose ongoing involvement since the first edition of this research project has been vital in strengthening the impact of this year's findings. Our appreciation also goes to the organisations who help contribute towards and promote the research within their networks and memberships: the **Network for National Excellence (nEdEx)**, the **National Association of Head Teachers (NAHT)**, and **Unbarrier.Me**.

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



“When we talk about schools, attention understandably focuses on exam results and educational standards. But the reality is that around half of the workforce in our schools and trusts are not in classrooms. Colleagues in roles like school business managers, HR, estates, finance, IT, catering, and communications play a critical role in ensuring pupils receive a high standard of education every day. These are demanding roles.

Delivering public services brings a continual drive to improve outcomes, often without access to the same levers for change available in other sectors. As a result, at times it can feel as if we are removed from decision making that is central to educational delivery.

CST strives to put schools and trusts’ voices at the heart of decision making, to help government understand what is happening on the ground, and the implications of each decision. Reports like this one are part of that work, shining a light on the reality of life in schools and trusts.

The results and findings should prompt reflection for trust boards and executive leaders. While some challenges such as funding constraints limit local flexibility and are likely to continue, other areas are within our control. Improving understanding of support roles and strengthening confidence in the systems and support available are areas where progress can be made collectively.

One of the great strengths of school trusts is their inherent flexibility to do things differently. We don’t always have to wait for government. This report is a chance for reflection, but also for action.”

Sofia McGreavy

*Employer Policy Manager
Confederation of Schools Trusts*

Section 1

Introduction

Introduction

The Mental Health and Wellbeing Index of School Business Leaders (SBLs) working within a Trust setting

Education Mutual is pleased to once again support the School Business Leader community with the launch of the second trust-focused 'School Business Leader Wellbeing Index'.

In response to requests from Education Mutual member trusts, Education Mutual set out to gain a deeper understanding of the wellbeing needs of School Business Leaders working within academy settings. Initial research was carried out in 2022, in partnership with Education Support, focusing specifically on SBLs working in maintained schools. This was followed by annual research to create the School Business Leader Wellbeing Index. Where possible, findings have been compared with results from previous years to track ongoing trends and changes.

Who is this report for?

This annual research is not only conducted for those working in SBL roles, but for everyone connected to them, such as colleagues, senior leaders, governors, policymakers, and organisations across the wider education sector.

School Business Leaders

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. We believe the data empowers you through supporting discussions with senior leaders, and informing your professional decisions. Your wellbeing matters, and this research exists to amplify your voice.

Trust Leaders

This research also informs 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 the valuable insights, strategies, and ongoing approaches of participating Trust Leaders with the goal of influencing the wider sector and promoting a collaborative approach.

Colleagues of School Business Leaders

To colleagues working alongside School Business Leaders, across all educational settings, this report aims to deepen understanding of the complexity and intensity of the role, while encouraging meaningful reflection on how you can collectively support their wellbeing. As academies continue to grow and colleagues often spend as much time together as they do with family, fostering a supportive and compassionate workplace culture is essential for the wellbeing of everyone.

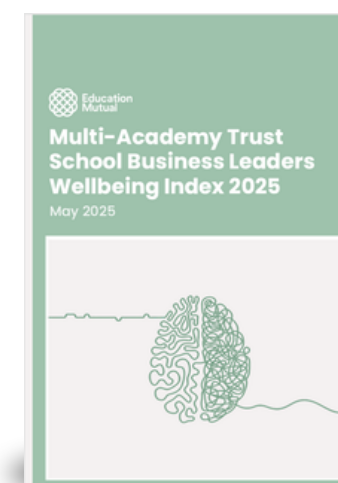
Executive summary

As the operational and financial responsibilities of schools continue to grow in scale and complexity, SBLs increasingly find themselves managing high-stakes pressures that can significantly impact their emotional resilience, job satisfaction, and long-term wellbeing. The findings reveal clear patterns around the types of support that make a meaningful difference. At the same time, the research highlights areas where systemic change is needed to create healthier, more sustainable working conditions for SBLs.

The project is guided by the following research questions:

- What are the work-related factors which have an impact on your mental health and/or wellbeing?
- Which types of mental health and wellbeing support are currently accessible through your school?
- Which services would be/are of most benefit in tackling these work-related issues?
- Overall, how well do SBLs perceive the mental health and wellbeing support provided by their workplace?

Previous versions of the research



2025 edition

The first edition of the trust-specific findings is available to download, print and share via the Education Mutual website.

Please scan this QR code with your mobile device to browse this version of the report. Alternatively, please visit the link below:

<https://www.educationmutual.co.uk/school-business-leader-wellbeing-index-2025/>



Summarised methodology

We continue to deliver a mixed-method design for the research, collating the results of 472 online survey responses, alongside a selection of telephone or online in-depth interviews with respondents to further explore issues raised in the survey.

This feedback gives us real insight into the pressures facing School Business Leaders today, helping us spot emerging patterns and understand where the sector is struggling most. By sharing your experiences, you help Education Mutual to design more responsive, targeted support that tackles the issues identified.

Some key participant figures to take from this years findings:

The full appendix and methodology for the ‘School Business Leader Wellbeing Index 2026’ is available to browse towards the back of the report.

Respondents by job title: Base: all respondents (n=472)



65%

of respondents were School Business Managers/ Directors/Leaders



11%

of respondents were Office Managers/Directors

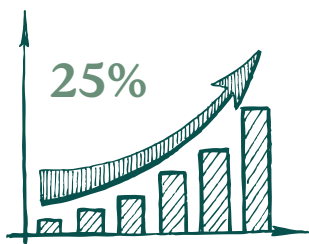


5%

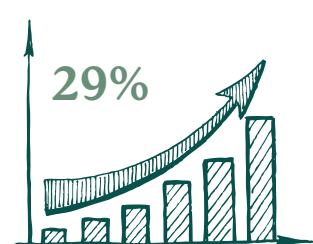
of respondents were Finance Managers/Directors

Respondents by tenure: Base: all respondents (n=472)

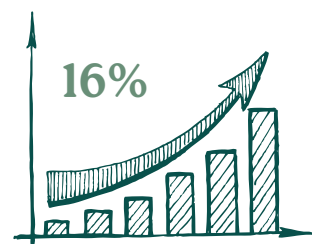
The top 3 most popular tenure brackets for respondents are featured below:



of respondents have been working within their role for 6 - 10 years



of respondents have been working within their role for 3 - 5 years



of respondents have been working within their role for 0 - 2 years

Respondents by age: Base: all respondents (n=472)

The top 3 age brackets for respondents are featured below:



18%

of respondents were aged between 45 - 49 years old



23%

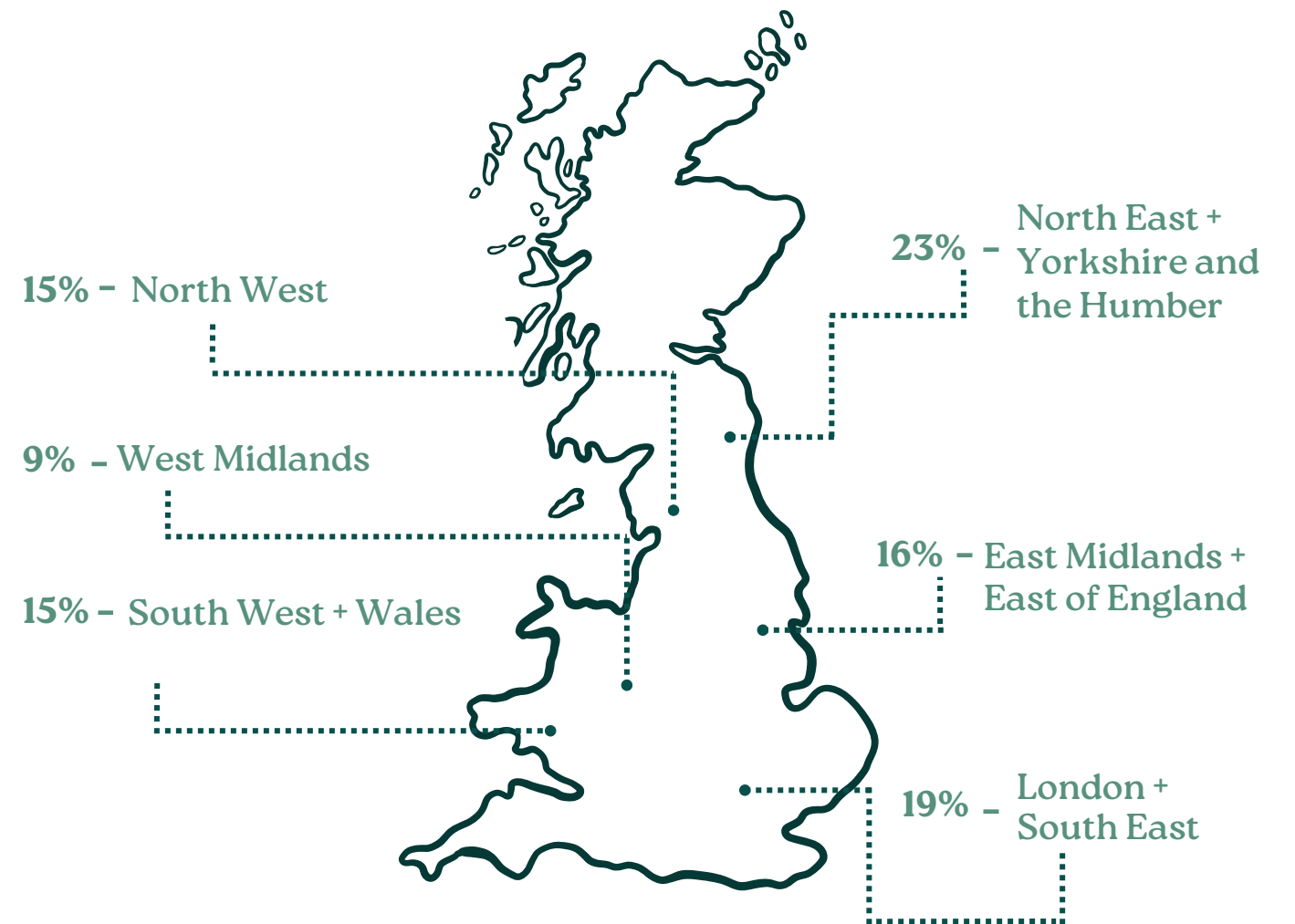
of respondents were aged between 50-54 years old



25%

of respondents were aged between 55-59 years old

Respondents by region: Base: all respondents (n=472)

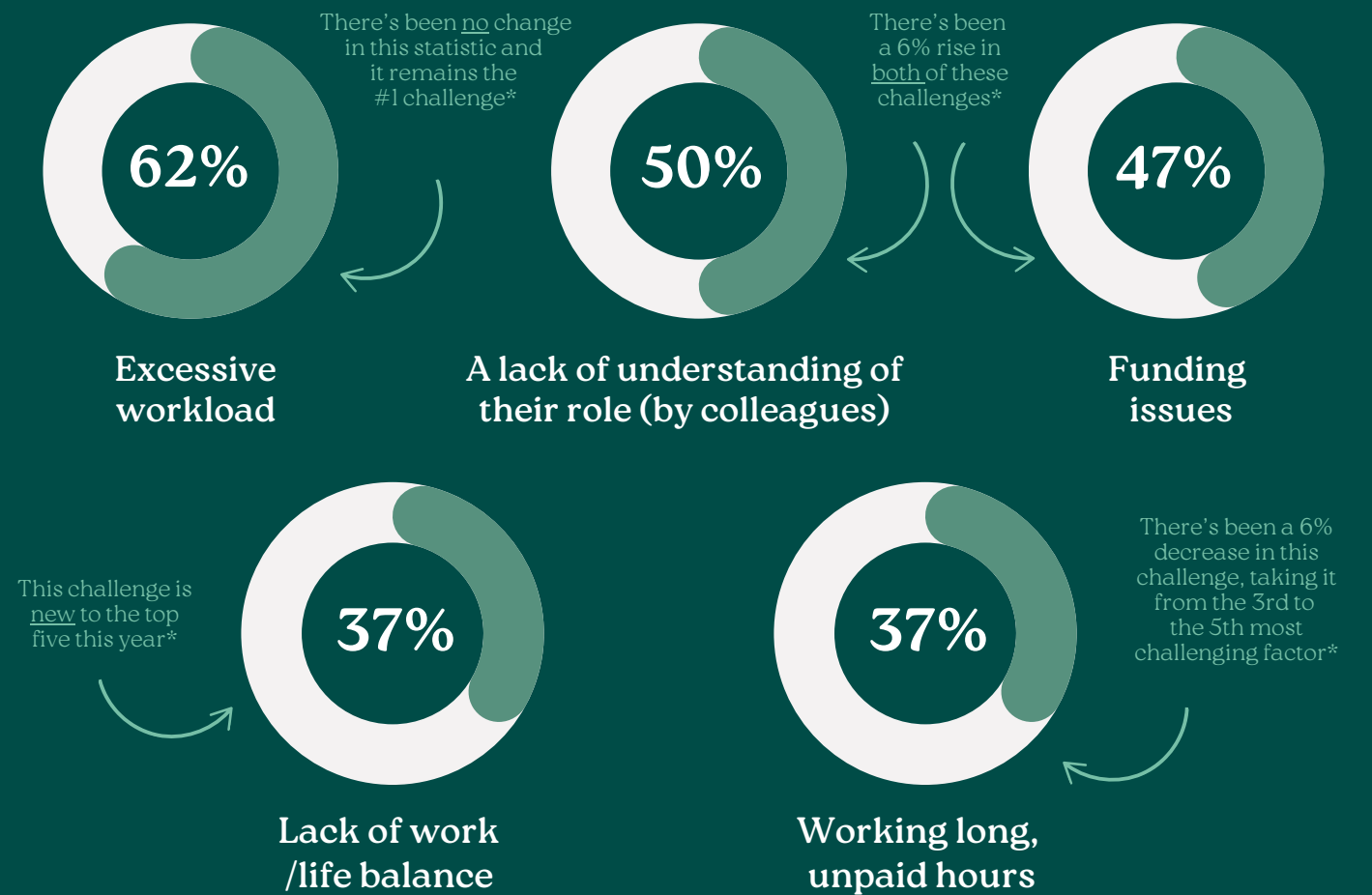


Key findings

A) What factors affect the mental health and wellbeing of SBLs who work within a Trust?

We asked School Business Leaders about the work-related factors influencing their mental health and wellbeing.

The top five challenges were:



Further analysis of the top five challenges can be found in Section 3 of the report.

You can read the full breakdown in appendix 1

*All data references are calculated by comparing results from the 2026 edition of the School Business Leader Wellbeing Index (MAT edition) with the corresponding findings from the 2025 edition.

Section 2

Key findings

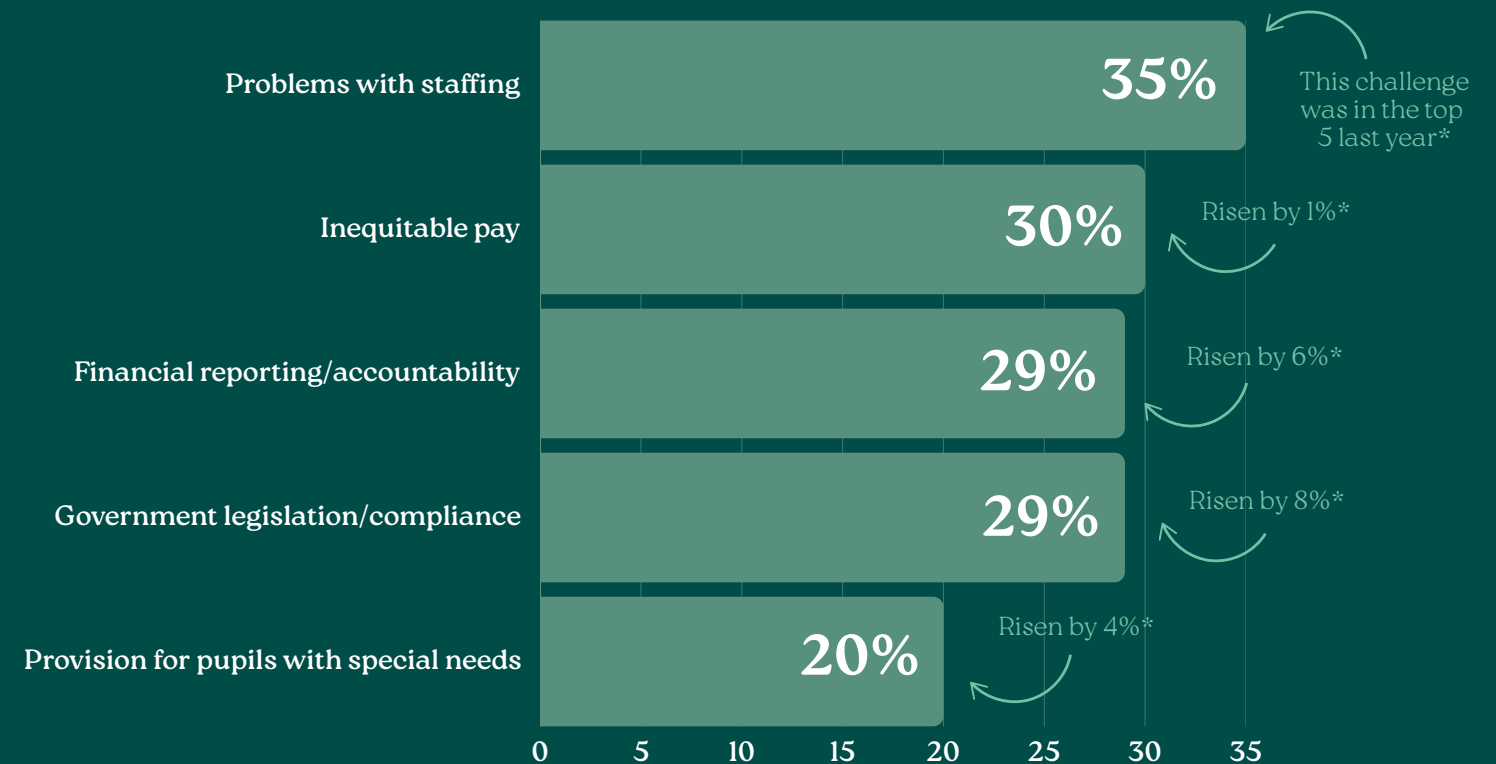
A) What factors affect the mental health and wellbeing of SBLs who work within a Trust?

(continued)

Emerging challenges that have risen in 2026:



The remaining challenges ranked in the top ten:



You can read the full breakdown in appendix 1

*All data references are calculated by comparing results from the 2026 edition of the School Business Leader Wellbeing Index (MAT edition) with the corresponding findings from the 2025 edition.

Exploring the differences between academy and Local Authority (LA) maintained school findings for 2026:

Some differences were also noted in the work-related factors affecting mental health and wellbeing depending on the category of setting that survey respondents worked in.

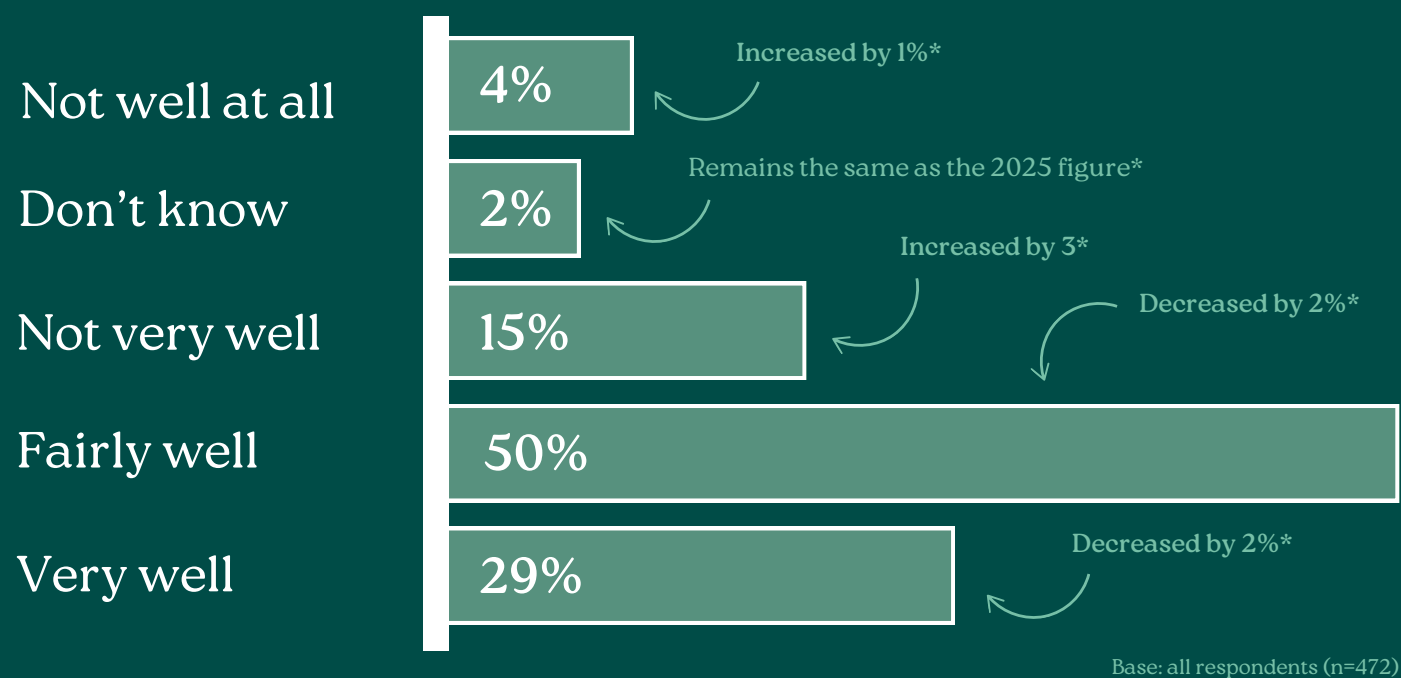
Respondents working in LA maintained schools were more likely than those from academies to mention the following factors:



B) Perception of employee mental health and wellbeing support

We asked School Business Leaders how well they thought that their multi-academy trust supports all their staff who experience problems with their mental health and wellbeing.

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



The chart above reflects how respondents perceive workplace support. This year shows a small increase in MAT-based staff who feel their Trust does not support them well. Even small increases in this category are important, as they point to more colleagues experiencing gaps in support or clarity around available provisions.

No differences in overall perceptions of support amongst survey respondents were found by phase, type of school or region.

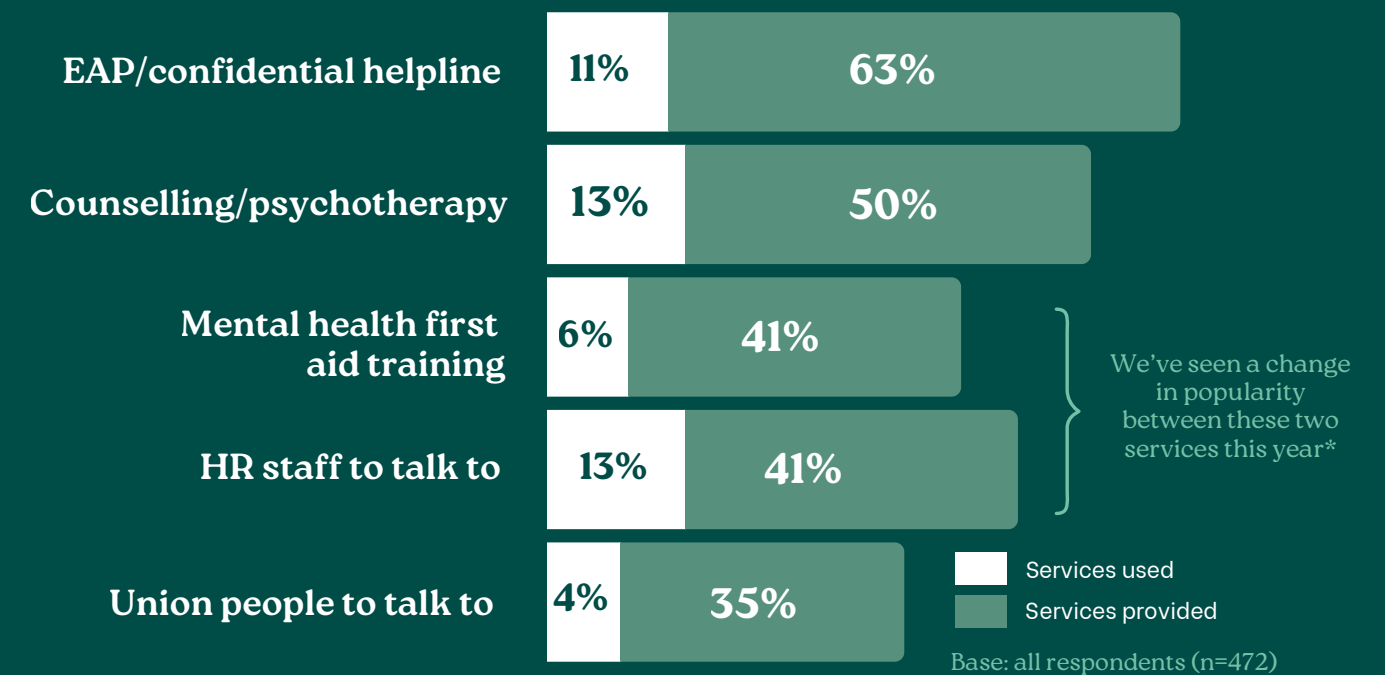
You can read the full breakdown in appendix 2

*All data references are calculated by comparing results from the 2026 edition of the School Business Leader Wellbeing Index (MAT edition) with the corresponding findings from the 2025 edition.

C) The wellbeing services being provided by MATs and used by SBLs

We asked School Business Leaders which mental health and wellbeing services their multi-academy trust currently provides for their staff.

SBLs from LA schools (50%) were more likely to say that they had not used any services, compared to those working in academies (38%). No other significant differences were found.



Services provided and used by phase

SBLs working in the primary phase had access to the fewest services on average and were the least likely to say that their trust provided access to:

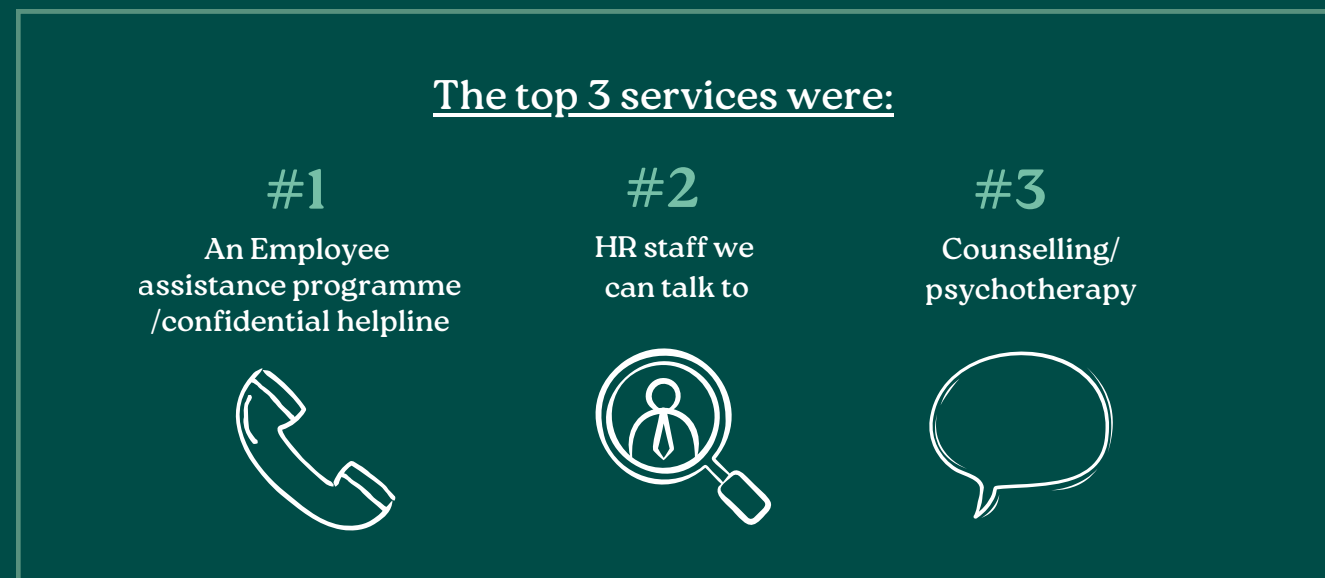
- 59% - EAP/confidential helpline
 - 36% - Mental health first aid training
- Which was also reflected in those working in the nursery/infant phase (36%)

SBLs working in the below phases were most likely to mention that they had used the below services provide by their trust.

- Secondary/mixed phases**
 - Exercise classes, groups or programmes (18%)
 - Mindfulness classes or programmes (13%)
- Other phase**
 - Professional coaching (18%)
 - Mental health first aid training (12%)

D) The most beneficial mental health and wellbeing services

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



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

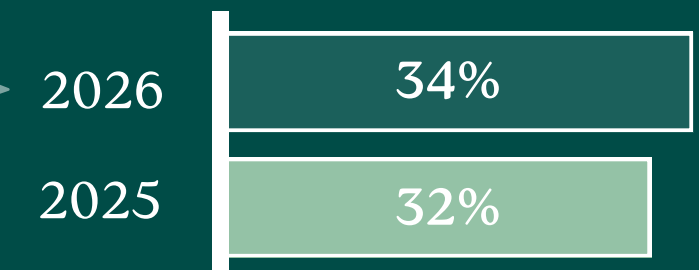
The chart below shows the top 10 services of benefit. Their first choice overall was to use an Employee Assistance Programme confidential helpline.



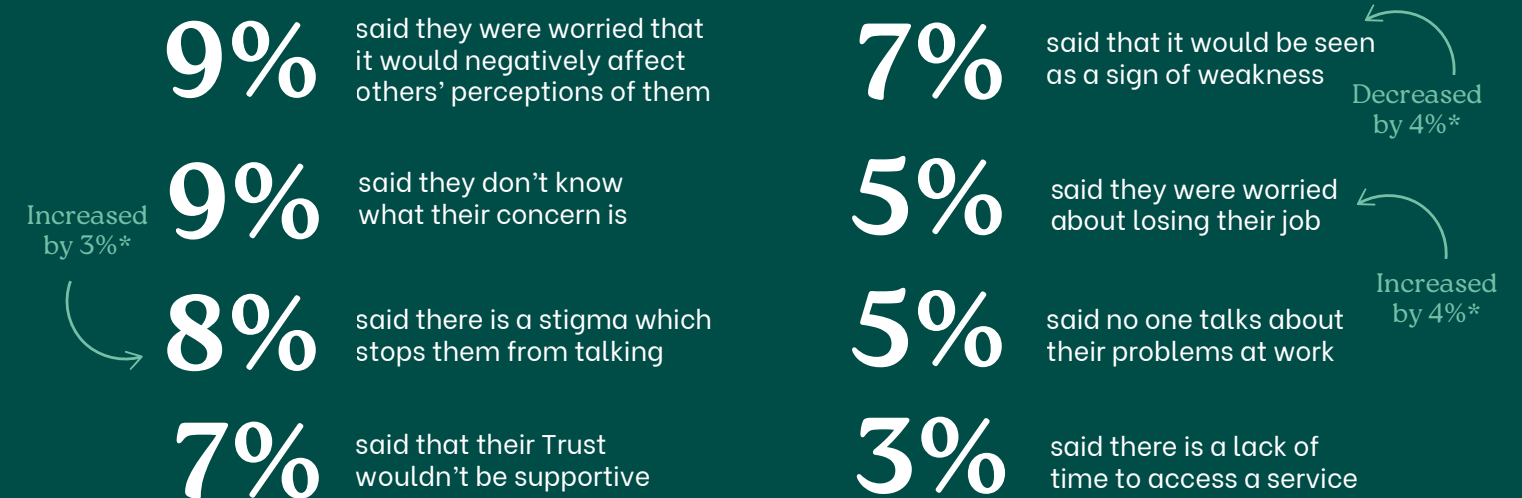
E) Barriers for not using workplace mental health and wellbeing services

We explored the factors that make it difficult for School Business Leaders to use the mental health and wellbeing support offered by their Multi-Academy Trust.

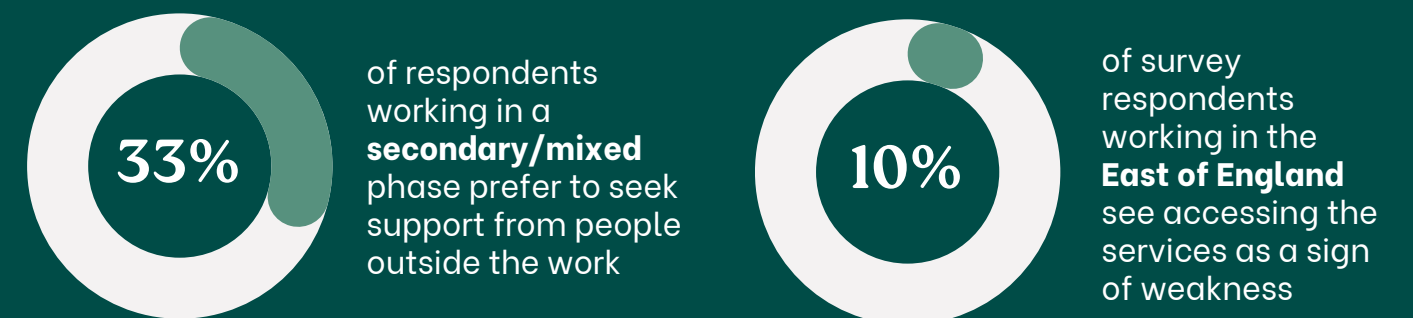
The survey identified that the percentage of respondents below preferred to seek support from people outside of work:



Further concerns for not using services provided by their school were:



Further results from this survey question:



Base: all respondents (n=472)

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

*All data references are calculated by comparing results from the 2026 edition of the School Business Leader Wellbeing Index (MAT edition) with the corresponding findings from the 2025 edition.

Further findings

The top ten services currently not provided

We asked School Business Leaders whether there are any additional wellbeing services beyond those currently available, that they feel would be useful.

We also asked them to consider this from another perspective: based on their experience, what services do they believe would benefit other staff members and help alleviate some of the challenges they face?

<u>For SBLs:</u>		<u>For staff members:</u>	
#1	Mindfulness classes or programmes	#1	Wellbeing sessions
#2	Resilience, energy or stress management classes or programmes	#2	Exercise classes, groups or programmes
#3	Wellbeing sessions	#3	Health -related support staff we can talk to
#4	Massage or relaxation classes or programmes	#4	Resilience, energy or stress management classes or programmes
#5	Exercise classes, groups or programmes	#5	Mindfulness classes or programmes
#6	Professional coaching	#6	Mentoring/coworker support schemes
#7	Animals in the workplace	#7	Facilitated peer support group
#8	Individual supervision as professional support <small>(provided outside of the line management relationship)</small>	#8	Massage or relaxation classes or programmes
#9	Mentoring/coworker support schemes	#9	Training on common mental health conditions
#10	Training on common mental health conditions	#10	Professional coaching

Base: all respondents (n=472)

You can read the full breakdown of reported services and usage rates in appendix 6

Perspectives from across the education sector

Further insight from nEdEx:



One area increasingly affecting the experience of School Business Leaders is recruitment and retention, with challenges being felt at both operational and strategic levels.

“Recruitment and retention remain significant challenges across the education sector, particularly within operational and support leadership roles where expectations continue to expand. Schools and trusts are competing for experienced professionals at a time when the pace, accountability and complexity of these positions have increased considerably.

Retaining talented people now requires more than recruitment alone. Trusts need clear career pathways, investment in professional development and working environments where people feel valued, supported and able to build sustainable long-term careers within the sector. Workforce stability is essential to organisational resilience, and the trusts that prioritise their people strategy will be best placed to navigate future challenges successfully.”

- Jen Elliott, Chair of Network for Education Excellence (nEdEx)

Further insight from SBL Support Hub:



An area we increasingly see affecting School Business Leaders is the growing digital and cyber responsibility that now sits within the role. Yet many have not had formal training or opportunities to build digital confidence in these areas.

Responsibilities that often now fall to the SBL:

- Oversight of IT infrastructure
- Cyber security
- Data protection
- Major system resilience

“Because these risks are preventative in nature, the work involved can be largely invisible when things are running smoothly. However, when systems fail or a cyber incident occurs, the impact can be immediate and significant. This combination of high accountability and limited specialist confidence can create a quiet but persistent source of stress.”

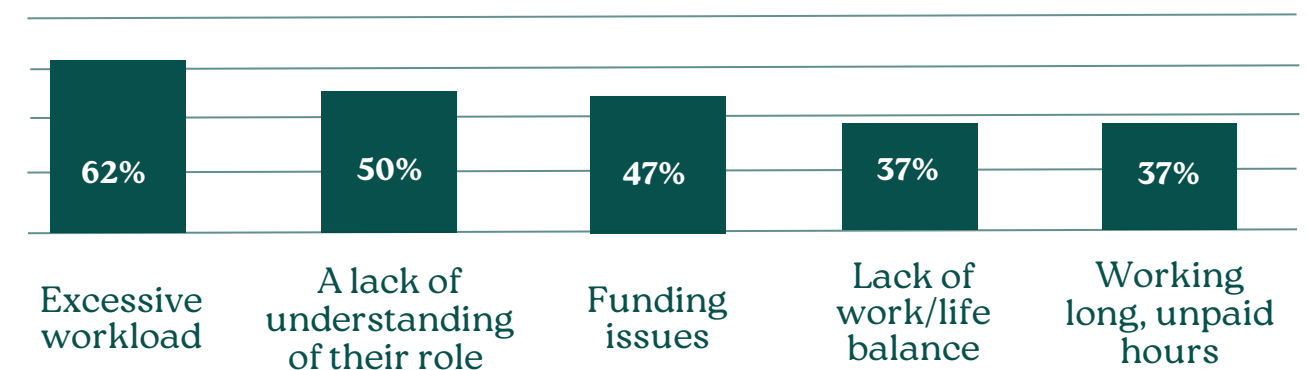
- Neil Limbrick, SBL Support Hub

Current issues

Our objective was to gain a deeper understanding of the various challenges currently faced by School Business Leaders (SBLs) working within an academy.

We asked School Business Leaders about the services provided by their trust that prove most beneficial in assisting them to manage the work-related factors impacting their overall workplace wellbeing.

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



A number of common themes were identified throughout the interview process and are outlined further in this section of the report.

Education Mutual would like to thank all participants for their contributions, which provide important insight into both individual experiences and wider shared patterns. Their reflections add valuable depth to the report, helping to illuminate the realities behind the data and strengthen understanding of the shared challenges and pressures currently experienced across the role.

Section 3

Current issues faced by SBLs working in Trusts

A) Excessive workload

The proportion of Trust-based School Business Leaders identifying this as the leading contributor to poor mental health and wellbeing has remained consistent year-on-year.

The figure recorded in 2025 has been mirrored exactly in 2026, reaffirming its position as the top factor affecting mental health and wellbeing across MAT settings.



Workload pressures stem from the wide scope of responsibilities

School Business Leaders thought that the sheer breadth and diversity of the role pushed them towards an increasingly operational focus. With time and capacity absorbed by day-to-day demands, many felt unable to work strategically, creating a cycle that sustained and exacerbated workload pressures over time.

This includes ‘core’ responsibilities, for example finance and facilities, with an increase in responsibility for areas such as:



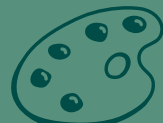
SEND



Cyber security



Sustainability



Marketing

Externally set deadlines driving workload:

Whilst an SBL might be contracted for term time, or term time plus 10 days, deadlines set by the Department for Education (DFE), local authorities, MATs, or exam boards (including year-end tasks, finance deadlines, school transition deadlines for marketing etc), cannot be changed to work around unpaid holidays and are often competing.

“SBL workload doesn’t have peaks and troughs anymore. If you are term time + 10 days, those 10 days aren’t enough for you to do the job and if you are all year round, the school breaks aren’t long enough to catch up. It just feels relentless. Coupled with the number of hats you have to wear, and everything feels urgent.”

- All Phase School Business Leader

Other factors influencing workload wellbeing included:

- **Department for Education demands**
For example, the number of duplicated data returns and the format and length of time to complete these were time consuming.
- **Unexpected/unplanned issues**
Emergencies arising due to lack of planning by other staff, that the SBL must respond to immediately, removed their focus from core functions and added to their workload.

With this emerging as the leading challenge for the SBL community, the following organisations contributed their perspectives:

“What comes through clearly in this year’s report is that excessive workload is no longer a temporary pressure, for many School Business Leaders it has become a constant reality. As trusts grow, operational complexity grows with them. Supporting multiple sites, managing increasingly complex compliance requirements and maintaining consistency across academies all place additional strain on already stretched teams.

Through our work at EPM and nEdEx, we are also seeing demand for outsourced capacity and specialist support higher than ever before, as trusts look for trusted partners to act as an extension of their internal teams. This reflects a growing recognition that capacity has not always increased at the same pace as trust growth. Without better workforce planning, clearer prioritisation and integrated systems that reduce administrative burden, there is a real risk that excessive workload becomes one of the biggest barriers to retaining experienced operational leaders within the sector.”

- Jen Elliott, Chair of Network for Education Excellence (nEdEx)



“Workload needs a twin approach. CST has long called for more timely government decisions and long-term settlements. That is starting to happen, with indicative multi-year plans for funding and pay. Trust needs to own this too, eliminating fluffload and streamlining how we work wherever possible.”



- Confederation of School Trusts (CST), 2026



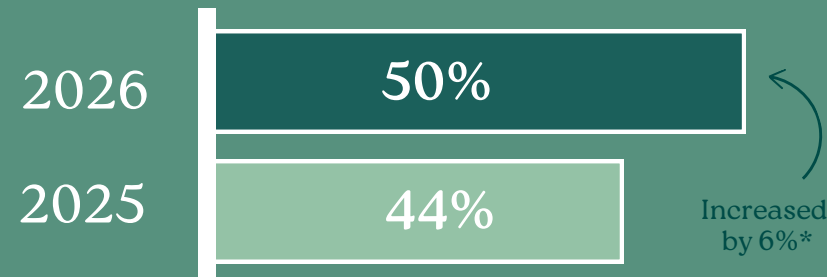
B) A lack of understanding of the School Business Leader role

All interviewees agreed that **the role of SBL is not well understood by school staff**. Misconceptions regarding the scope and boundaries of the role could contribute to an excessive workload.

Respondents mentioned that a lack of understanding of the working role of an SBL was most common with:

-  Parents of school pupils
-  Teaching staff

This comparison with the previous years shows that the issue remains ongoing for multi-academy trust SBLs, with its impact continuing to rise and ranking as the second most challenging factor.



What drives misconceptions about the SBL role?

- Many of their functions are unseen
- Numerous variations of the role in different schools, trust and contexts
- Non-teaching roles are often overlooked within the education sector

In addition, several organisations were commended—both during interviews and in the open-text responses of the initial survey. **The Institute of School Business Leadership, Education Mutual**, and the **Department for Education** were all recognised for their efforts in raising the profile and professional recognition of the role.

In response to this recognition, the Department for Education provided the following statement:

“School business professionals lead the financial and operational management of schools and academy trusts and play a vital role in ensuring every child achieves and thrives. One of our key aims is to continue to raise awareness, understanding and highlight the importance of the profession both within the sector and within the Department.”

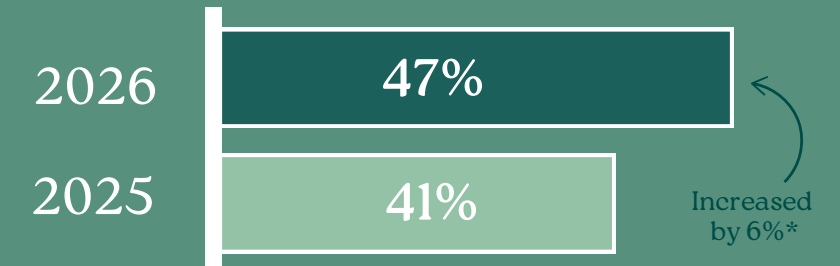
- **The Department for Education, 2026**

*All data references are calculated by comparing results from the 2026 edition of the School Business Leader Wellbeing Index (MAT edition) with the corresponding findings from the 2025 edition.

C) Funding issues

Funding issues underpinned all other elements of the School Business Leader role. Participants frequently highlighted that these funding limitations were largely outside of their control, heightening feelings of frustration and powerlessness.

This comparison with the previous years shows how the challenge currently stands, having risen to the third most challenging factor in this year’s MAT edition of the SBL Wellbeing Index:



The most common issue related to funding was staffing costs

The only significant saving remaining for respondents was typically staff restructuring and redundancies. Taking on additional responsibilities was a frequent occurrence which could negatively impact the whole school environment, for example, backend and administrative staff cuts could lead to insufficient support structures for the SBL and teachers.

The relationship between funding and workload

Funding was the greatest contributing factor to workload and wellbeing identified in the interviews. It underpinned all other elements of the role and was felt to be largely outside of an SBL’s control.

Within a school or trust, interviewees thought that a key barrier to supporting them with their workload was a lack of funding. For example, funding is required to appoint additional staff to assist with SBLs’ remit, or for a MAT to centralise more functions.

➤ Recruitment and retention

This has been described as a continual problem. One respondent commented that applicants for non-teaching and teaching assistant posts were often unqualified or inexperienced. Where possible, applicants were attracted by reorganising part time roles to be full time, or agency staff were used.

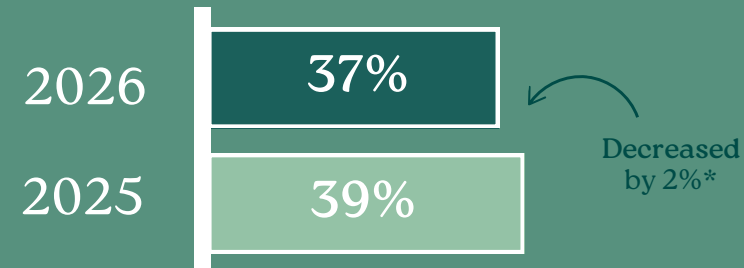
All interviewees said that they have covered for other roles/staff such as:

-  Caretaker
-  Lunch duties
-  Catering
-  Cleaner

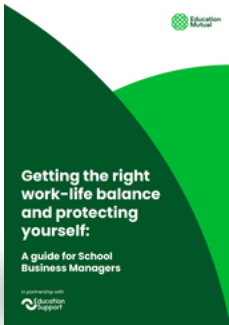
D) Lack of work-life balance

As trusts continue to grow in size, complexity and accountability, SBLs are finding themselves at the intersection of operational delivery and regulatory compliance, often without the capacity, resourcing or structural clarity needed to manage these responsibilities sustainably.

Although fewer SBLs in multi-academy trusts reported a lack of work-life balance as negatively impacting their wellbeing, the issue has moved from sixth place last year to fourth this year:




Decisions made centrally can have implications across multiple sites, while inconsistencies between academies require careful navigation and significant administrative oversight. Without meaningful action, there is a risk that poor work-life balance will continue to erode retention across MATs.



A guide for SBLs:

Developed by Education Mutual in partnership with Education Support, we provide School Business Managers with some key insights, strategies and techniques to put into practice when needed.



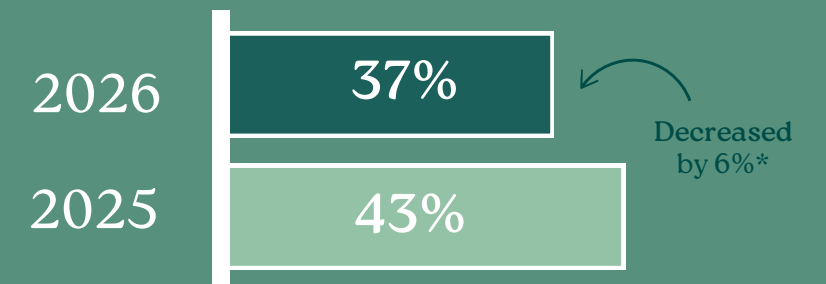
Contributing challenges to a lack of work/life balance for School Business Leaders working in Multi-academy trusts were:



E) Working long, unpaid hours

Unexpected issues / emergencies that SBLs had to respond to immediately caused by a lack of planning by other staff, disrupted their workplans and additionally added to their workload.

There's been a reduction in the proportion of SBLs in multi-academy trusts working extra hours without monetary reward, resulting in this factor dropping from third to fifth in terms of challenge ranking:



What's driving the rise in unpaid hours for School Business Leaders?

- **An excessive workload**
Rather than being isolated pressures, excessive workload and long unpaid hours sit within the same cycle: as responsibilities grow and capacity fails to keep pace, SBLs increasingly absorb the pressure personally, extending their working day without financial recognition. For many, unpaid hours have become the mechanism by which an unsustainable workload is managed.
- **Department for Education (DfE) and other external deadlines**
Externally dictated deadlines were often competing or did not align with contracted hours, making it challenging for School Business Leaders to keep up with requirements.



*All data references are calculated by comparing results from the 2026 edition of the School Business Leader Wellbeing Index (MAT edition) with the corresponding findings from the 2025 edition.

New issue for 2026

Provision for pupils with special needs

The survey found that:

20% of SBLs detailed that the lack of provision for pupils with special needs has become an increasingly common problem within an academy setting



Increased Special Educational Needs and Disabilities (SEND) numbers and the level of support required was a significant issue for all the SBLs interviewed. Some mentioned wellbeing being affected due to staff feeling underqualified or unable to adequately and safely manage this in class.

Specific factors related to SEND reported by SBLs included:

➤ **Increase SEND numbers and level of support required**

An SBL found dealing with SEND issues and supporting staff impacted by an increase in SEND was 'overwhelming'. Interviewees felt they were unable to meet student needs or properly support staff.

"It (SEND) is an additional pressure and strain on staff, which then doesn't help with staff retention and staff sickness. That has a knock-on effect on me and the SENCO, who are absolutely inundated with work, and trying to work out top up funding, which doesn't meet additional staff wages. It's really hard you know, I'm currently looking at having to book in restraint training for all staff on an inset day."

- Primary School Business Leader

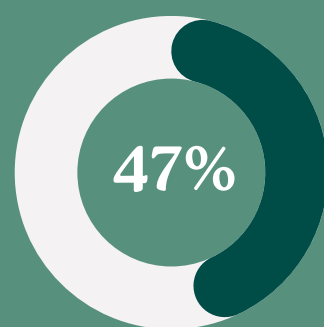
➤ **Lack of clear SEND funding advice and Education, Health and Care Plan (EHCP) guidance**

This includes from, or access to, local authority SEND teams, exacerbated by local authority funding cuts.

A strong link to funding issues:

Declining specialist workforce capacity

Respondents reported that cuts to roles such as SEND Teaching Assistants had a direct impact on their ability to manage behavioural issues effectively. These issues had to be managed by remaining school staff where available, but most frequently by the SBL who was often the most physically available and one of the few non-teaching members of staff in the school.



Funding issues

All those interviewed talked about having to regularly stop work to remove and support disruptive or dysregulated children outside of class. The resultant feelings of frustration from remaining staff who have either lost paid hours, have gained tasks, or are impacted by the increase in behavioural issues are then expressed to the SBL. The negatively affected their wellbeing, with one SBL describing managing this fallout of staffing cuts as 'brutal' to their wellbeing.

"It's the pressure of spreading the funding too thinly. Being the person to say "We can't afford that person anymore". Especially in primary where people have multiple roles, e.g. someone might be an LSA [Learning Support Assistant] and do lunchtime supervision, and breakfast role. But if you need to cut their LSA hours, then you see a grumpy face and if the Head doesn't own the budget and say it was a whole leadership team budget, the SBM becomes more isolated."

- Secondary/Middle School Business Leader

➤ **Non-funded interim support for children**

For children transitioning into schools without evidence of need, or an Education, Health and Care Plan (EHCP), put further financial pressure on SBLs.

Several interviewees raised the budgetary impact this has, with some pushed into deficit; and the effect on their mental health that this can have. Long delays in the EHCP process exacerbated this.

➤ **SEND funding shortfall**

This is specifically aimed at experiences where funding for one-to-one support does not meet staffing costs. Two interviewee's schools have been forced into deficit. SBLs reported that differing costs associated with significantly different levels of need were not met by the flat rate of funding.

Section 4

Trust Leaders People Strategy Survey

Empowering School Business Leaders

About the 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.

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 strategies and initiatives shared by others working within the sector that can be incorporated into their own People Strategy.

► School Business Leaders

The findings of this additional survey offer a clear view to School Business Leaders of what has been acknowledged, what actions are currently being taken, and what gaps remain in addressing these issues within academies. The objective is for SBLs to 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

“This year’s findings reinforce how closely linked workforce wellbeing, operational effectiveness and educational outcomes have become. School Business Leaders are operating in an environment shaped by funding pressures, rising expectations and increasing operational complexity, all while playing a critical role in keeping schools and trusts sustainable.

What is clear is that trusts need strong people strategies, better workforce intelligence and smarter use of integrated systems to support informed decision making and reduce avoidable pressure on teams. Supporting employees effectively is not separate from organisational performance, it is fundamental to long-term educational success and the future resilience of the sector.”

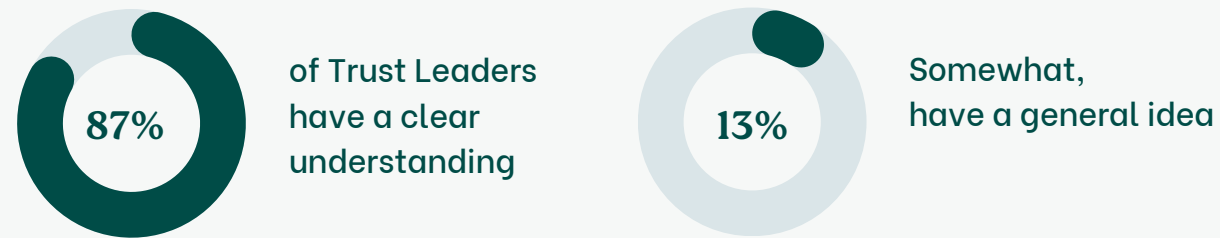


Jen Elliott

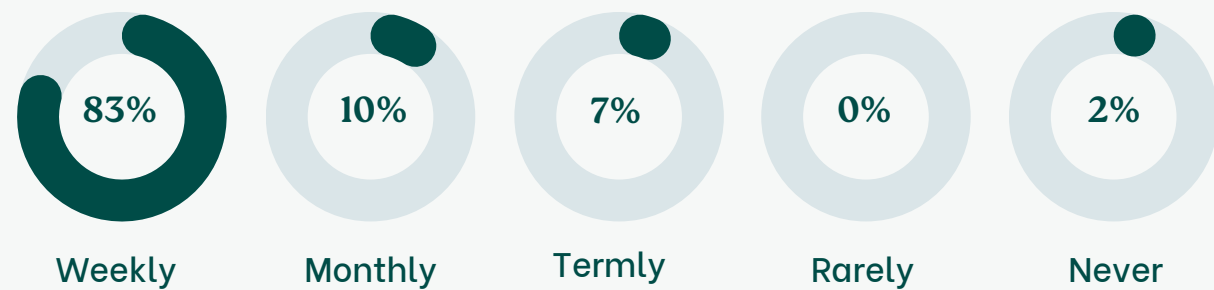
Chair of Network for Education Excellence (nEdEx)

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?

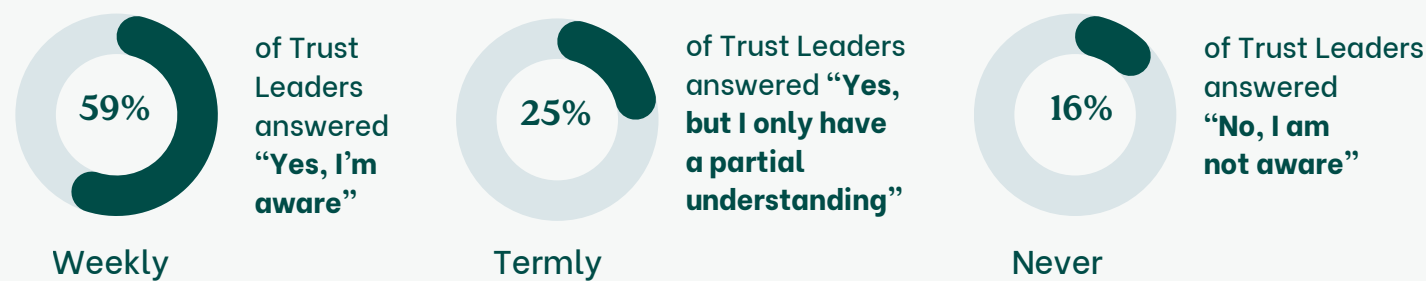
The survey found that:



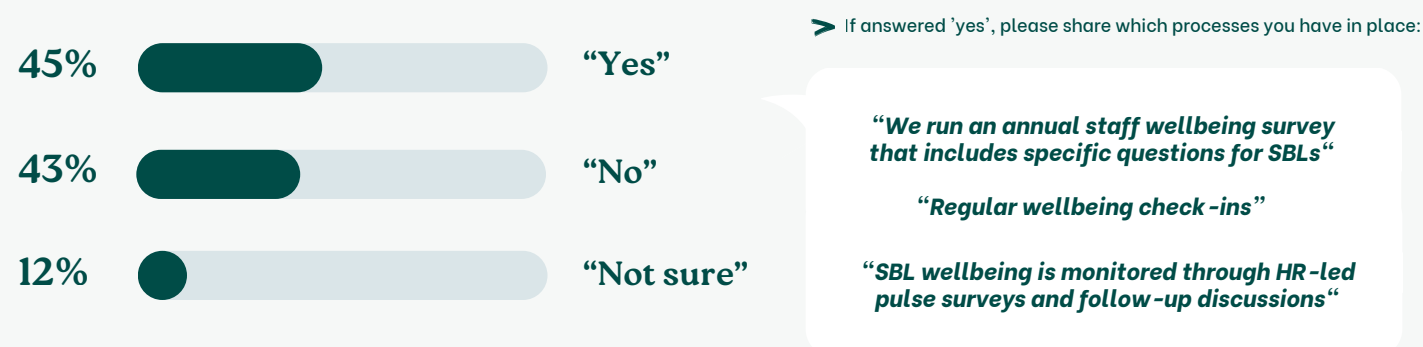
2) How frequently do you personally engage with the School Business Leaders within your Trust?



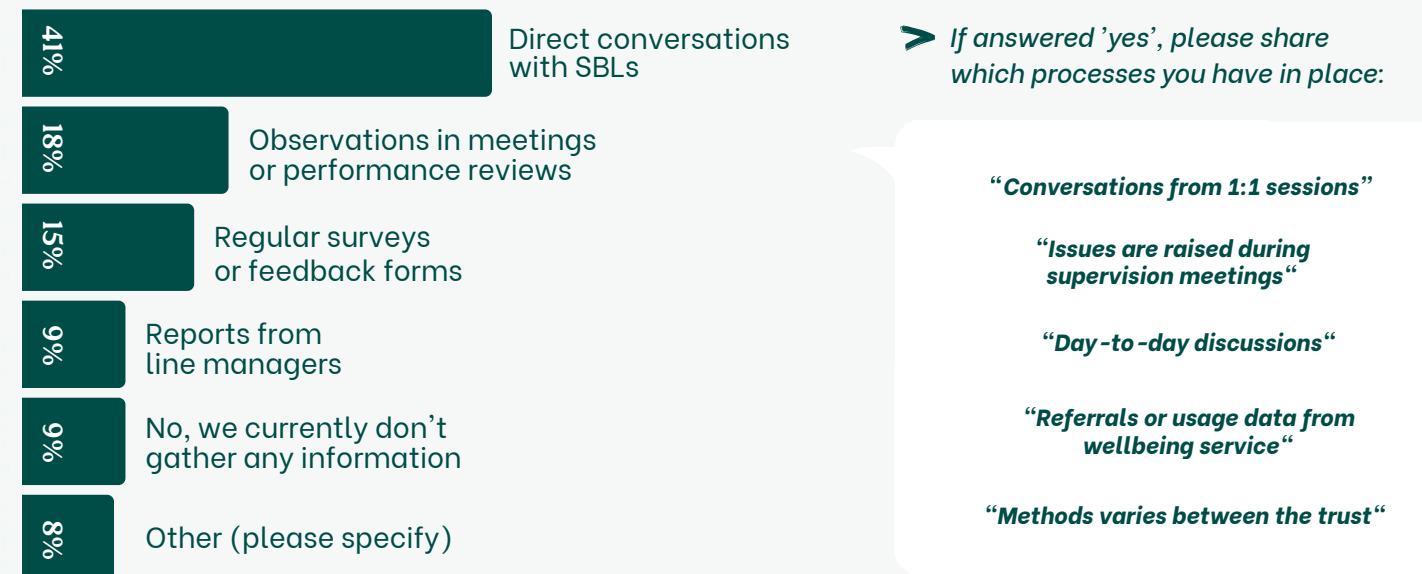
3) Are you aware of the current state of your SBLs mental health and wellbeing?



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



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



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?

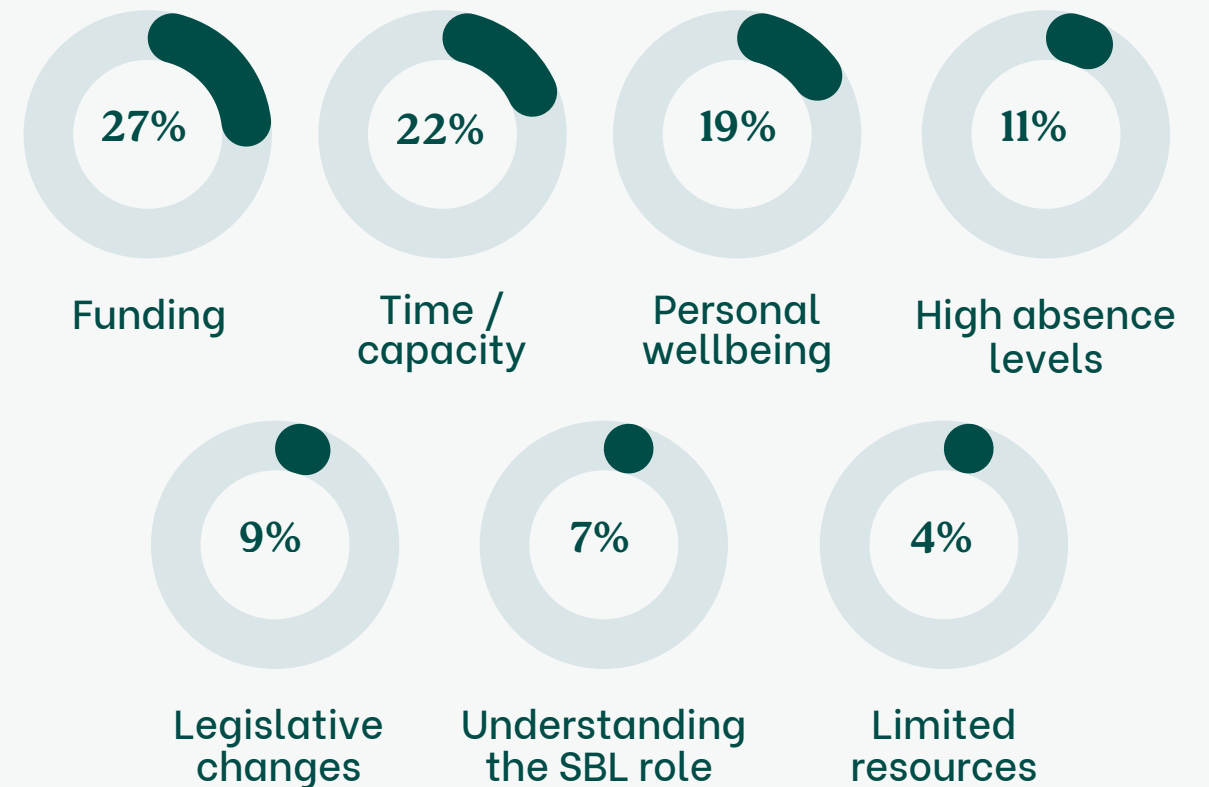


8) What additional support and resources do you believe would be most beneficial in improving the wellbeing of your SBLs?

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.

- | | |
|---|---|
| #1 <i>Work from home and / or wellbeing days</i> | #6 <i>Trust-wide or regional peer support groups</i> |
| #2 <i>An employee health and wellbeing package</i> | #7 <i>Professional development in the form of leadership coaching or mentoring</i> |
| #3 <i>Role-specific services / mental health support</i> | #8 <i>A positive relationship with the Head Teacher</i> |
| #4 <i>Clear operational guidelines and advice when academising or merging Trusts</i> | #9 <i>Support needed to balance budget pressures</i> |
| #5 <i>More realistic workload expectations</i> | #10 <i>Greater transparency during periods of change</i> |

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?

Please see below for a selection of responses from respondents:

“There needs to be greater recognition of what SBLs are responsible for”

“I encourage SBLs to work in groups within the Trust”

“Utilise the services within the staff package, and if you have concerns, voice them to us”

“Come and chat if you have any concerns, especially if the workload is too much”

“We are operating in a very challenging financial environment“

“Approaches to wellbeing shouldn't vary across the Trust, it should be consistent“



Our Summary

Section 5

Conclusions and recommendations

The latest MAT-specific research confirms that a wide range of work-related pressures continue to adversely affect the mental health and wellbeing of School Business Leaders. Although some issues change in prominence year-on-year, a number of persistent challenges remain and are becoming increasingly acute. These primarily focus on:

The ever-expanding role of a School Business Leader

As trusts acquire more academies, centralise functions, and restructure operational models, the remit of the SBL often expands accordingly—absorbing additional responsibilities linked to governance, compliance, procurement, estates, HR, payroll, risk management, data reporting, policy implementation, and change management across multiple sites. Crucially, much of this work takes place behind the scenes, meaning its scale and impact remain largely unseen by teaching colleagues, academy leaders, and, at times, even trust leadership.

Blurred boundaries between work and personal life

Excessive workload remains a persistent and unresolved challenge for School Business Leaders (SBLs) working within multi-academy trust (MAT) settings, with survey findings showing no change in prevalence compared to the previous year. Crucially, the data highlights a strong and ongoing link between excessive workload and a lack of work-life balance, with SBLs frequently describing an inability to disengage from work or to establish clear boundaries between professional and personal time. This imbalance is particularly pronounced within MAT settings, where centralised functions and trust-wide responsibilities can extend far beyond the scope of a single school day.

Rising financial constraints

Funding pressures continue to be one of the most significant and enduring factors, with the latest findings showing a 6% increase this year in the proportion of respondents identifying funding as a key challenge. This rise highlights how financial strain drives many of the top challenges, including low income, staffing problems, redundancy, and SEND pressures. Collectively, these interconnected issues place sustained stress on SBL wellbeing.



Our conclusions

Drawing on the experiences and insights shared throughout the research, Education Mutual has identified a number of key conclusions that reflect both the pressures embedded within the role and the resilience demonstrated by those who undertake it. While pockets of positive support do exist, the evidence highlights ongoing gaps between intent and lived experience. Collectively, these conclusions reinforce the need for more consistent approaches to wellbeing support. The following section explores these conclusions further, setting out what Education Mutual think must change to better support the mental health and long-term sustainability of the School Business Leader workforce.

Concerns about confidentiality reducing service uptake

For School Business Leaders working within multi-academy trusts, perceived barriers to accessing health and wellbeing support remain evident. These barriers often stem from a lack of confidence in confidentiality arrangements, with some SBLs expressing concern about how personal information may be handled within wider trust structures, or questioning the independence of services provided through the employer.

Provision for pupils with special needs

While not reported as acutely as within local authority maintained schools, issues relating to SEND provision have now emerged as a notable concern for School Business Leaders working within multi-academy trusts, entering the top ten challenges for the first time. This shift suggests a growing pressure point for MAT-based SBLs, as trusts increasingly grapple with limited funding. This is restricting staffing levels and specialist support, placing pressure on trust budgets and the wellbeing of all staff.

A consistent picture of trust support for SBL wellbeing

School Business Leaders generally reported that their Trust supports mental health and wellbeing fairly well or very well, reflecting growing recognition of wellbeing at Trust level and the availability of formal services and support mechanisms. This perception aligns with insights from the Trust Leader survey, which indicates that communication and oversight are strong, with around 80% of leaders confident they are informed about what is happening for their SBLs.



Our conclusions

Drawing on the experiences and insights shared throughout the research, the Confederation of School Trusts (CST) has closely reviewed the findings of this year's edition, bringing a trust-wide perspective to what the data reveals about the realities facing school business leaders today. Informed by both the evidence within the Index and CST's direct engagement with trusts across the country, the following section explores these conclusions in more detail, setting out what CST believes must change to better support the mental health and long-term sustainability of the school business leader workforce.

Workload challenges not going away

Excessive workload remains the biggest challenge cited by SBLs. With plenty of change on the horizon through the schools and post-16 white papers, plus changes to employment legislation, trusts will need to think carefully about how to protect staff welfare through the changes.

Similar roles, different challenges

There are some marked differences between challenges for trust and maintained SBLs. Trust SBLs are much less likely to report funding, SEN provision, problems with parents, taking leave, and restructures as impacting mental health and wellbeing.

A highly-gendered, stable workforce

Some 94% of respondents identified as female, with 59% aged 50 or over. 47% have tenure after six years, with another 29% over three years. 87% report as white, slightly over the national average.

Diverse support is on offer, and valued

Overall 79% say their mental health is fairly or very well supported and trusts provide a wide range of support services. These aren't always accessed – but that doesn't mean they aren't valued or effective for those that call on them.



Our recommendations - For SBLs



Our recommendations - For the Wider Education Sector

Are you able to participate in local or national SBL networks and/or events that provide opportunities to share experiences and address key issues?

Does your academy run any support groups? If not, you could consider setting one up. Even creating a small WhatsApp or LinkedIn group with nearby SBLs can become an incredibly valuable source of support.

Staying connected with others in similar roles can make a significant difference. Consider how visible and engaged you are on professional platforms such as LinkedIn or within online SBL networks and forums, where shared experiences and advice can offer reassurance and perspective. Keep an eye out for events, conferences, and networking opportunities taking place throughout each academic year, as these can provide valuable learning and peer connection beyond your own setting.

Can you explore practical steps that could help overcome barriers to accessing your school's wellbeing services?

This year's findings continue to highlight the hesitancy in accessing wellbeing support due to a range of perceived barriers, particularly concerns around confidentiality. One way to help alleviate these concerns is to check whether wellbeing support is delivered by an external provider, which can offer added reassurance about privacy and independence. It can also be helpful to review how clearly these services are communicated within the school or trust – simple, visible signposting in shared staff spaces, internal bulletins, or newsletters can make access feel more straightforward, transparent, and safe.

Are workload priorities being clearly communicated and realistically set?

Improving wellbeing amongst the SBL community requires a conscious shift towards clearer boundaries around working hours. Regular reflection on working patterns can help identify where expectations have become unsustainable, particularly where long unpaid hours are normalised. Creating structured daily priority lists is one practical way SBLs can manage competing demands and highlight capacity limits. By clearly communicating these priorities to senior leaders, with a focus on highlighting the implications of reprioritising tasks, the accountability and effective decision-making can be shared. This starting point aims to reduce risk of stress, overload, and long-term burnout.

Can the media take action to improve understanding of School Business Leadership?

Greater engagement and support from the media would be widely welcomed across the education sector to help improve recognition and understanding of the SBL role. By elevating the profile of School Business Leaders through features, case studies and sector-informed commentary, the media has an opportunity to strengthen professional understanding, and support a more informed public narrative around how schools are led and managed.

What changes to reporting formats, timelines and earlier notice could be applied to support a more sustainable workload?

Externally set deadlines, particularly those driven by Department for Education data returns and reporting formats, continue to place significant additional pressure on School Business Leaders, compounding already excessive workloads. As a sector, there is a clear opportunity to improve this. Greater collaboration with SBLs when setting timelines, earlier notice of changes, streamlined reporting requirements, and more consistent formats would help reduce avoidable pressure.

What more can organisations introduce to encourage further sector-wide community collaboration for SBLs?

There is clear scope to build on the strong foundations set by the DfE, ISBL and Education Mutual by doing more collectively to support School Business Leaders. Other organisations can play a greater role by consistently amplifying the SBL voice, embedding their perspectives into decision-making, and recognising the strategic impact of the role. More coordinated guidance, clearer communication, shared research, and accessible professional development opportunities through virtual and online methods would help reduce pressure and isolation.

Will national research be utilised to track SBL wellbeing?

There is a clear opportunity for the wider education sector to strengthen its commitment to School Business Leader wellbeing by making more consistent use of national research. Existing studies and large-scale data collections, including Department for Education surveys, offer an important evidence base to understand pressures facing the profession. When reviewed collectively over time, such research enables the sector to identify persistent challenges, emerging risks and wider patterns influencing SBL wellbeing.

Our recommendations - Trust Leaders

Is a consistent, whole-trust approach to health and wellbeing in place across your academies?

Providing universal access to services reduces stigma, encourages engagement and ensures support is available before issues escalate into long-term absence. By utilising an Education Mutual Staff Absence Protection membership, trusts can take a proactive and inclusive approach, offering pupils, teaching staff, support staff, School Business Leaders, Trust leaders and CFOs/COOs access to a wide range of services and professional development opportunities at no additional cost.

If your academy is amongst the 74% of respondents with an Education Mutual staff absence protection membership, are you making full use of this? There's a range of services, training and professional development opportunities available to support both yourself and your team - Browse via www.educationmutual.co.uk/service/mental-health-and-wellbeing-services/

If your academy isn't currently part of that percentage, have you considered how a staff absence protection provider could help you implement a whole-trust approach to health and wellbeing? You can request a quote via www.educationmutual.co.uk/contact-us

Are you modelling healthy leadership through your own self-care methods?

Findings from the Trust Leader People Strategy Survey show that many of you are feeling the strain, carrying heavy responsibility while quietly struggling yourselves.

It's important to recognise that you cannot pour from an empty cup. Sustaining a healthy, high-performing trust is not possible if those at the top are running on empty. By giving yourself permission to seek support and to set healthy boundaries, you lead by example and create space for SBLs to do the same. Looking after yourself is not a weakness, it is a powerful act of leadership that ultimately strengthens your people, your culture and your trust.

Can you identify the hidden barriers limiting engagement with trust-wide services?

We actively encouraged you to use the research findings to identify whether any School Business Leaders within your trust are experiencing barriers to accessing available wellbeing support. Understanding where challenges exist, and use it as a first step in addressing them. These conversations do not need to be complex; they can be meaningfully integrated into regular wellbeing check-ins, annual staff wellbeing surveys, or informal weekly, monthly or termly discussions

Our recommendations - Trust Leaders

Do your colleagues really know what each other do?

It can be easy to take for granted what colleagues do. While there is better awareness in trusts than maintained schools, 50% of SBLs still report a lack of understanding about their role. Encouraging more understanding between departments can help colleagues feel more valued, and to work together more effectively.

Is your trust's culture where you want it to be?

The vast majority of SBLs say they feel supported, and trusts invest in multiple support options. But just under one in ten think asking for help would negatively affect how they are viewed. Think about how you and other leaders model behaviour, and how you can make asking for help a positive step, not a negative one.

Are you prepared for changes on the horizon?

Workload is a constant battle, and there is lots of change coming to the sector - but good preparation can reduce anxiety and smooth implementation. Are your trust's executive leaders and trustees making best use of resources like CST's member briefings and guidance to keep informed, and plan ahead?

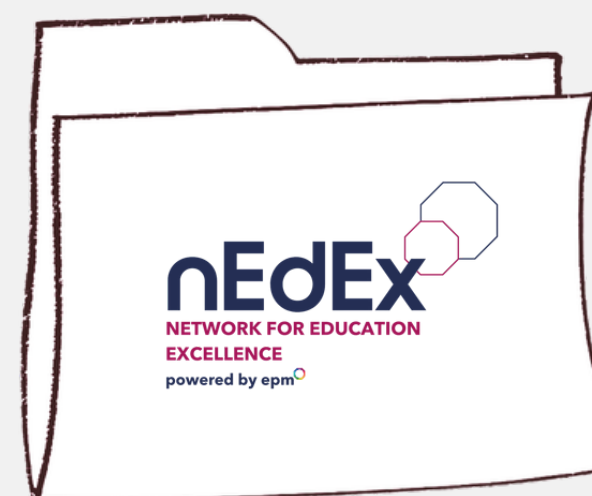
Is staff wellbeing on your trust board's agenda?

Organisations can often be driven by the things they measure, and in schools that often means exam results and Ofsted results. But these aren't achieved separately from staff wellbeing: flourishing children need flourishing adults. Do you have the right KPIs to ensure that trust and school leaders hear and utilise staff voice?

Resource directory

Each folder below represents a valuable contribution from our partners and collaborators. We hope these materials support your understanding, spark new ideas, and enrich your research journey.

Simply click a folder to access the resource they've provided:



Section 6

Useful 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 wellbeing support.

We're the UK's largest member-owned provider of staff absence protection and are recommended for schools by the Department for Education through the Crescent Purchasing Consortium framework. Memberships are tailor-made to align with each school's unique needs, securing extensive coverage customised to help fit your budget requirements.



We have published three resources which you may find helpful:



- #1 Supporting each other with mental health and wellbeing: A guide for School Business Managers
- #2 Getting the right work-life balance and protecting yourself: A guide for School Business Managers
- #3 Ofsted inspections and wellbeing: A guide for School Business Managers

The below services are included in all Education Mutual memberships at no additional cost:

- 24/7 GP service
- Flu vaccines
- Physiotherapy
- Balancing parenthood
- Nurse support service
- Voice care
- Surgical assistance
- Stress management
- Face-to-face counselling
- Mental health first aid training
- Grief & resilience
- Mentally healthy school community
- Financial wellbeing coaching
- Men's mental health
- Sleep therapy
- Supporting staff in the workplace
- Menopause counselling
- Menopause coaching
- Perfecting your personal journey
- Menopause blog
- Symptoms tracker
- Guidance for partners
- Neurodiversity training
- Occupational health assessments
- Staff reputation legal protection
- New employee assessments
- Leadership development
- Risk management protection
- Occupational health support line
- Occupational health hub

Useful resources



Confederation of School Trusts

CST is the national organisation and sector body for academy trusts. Its members educate more than four million children through the dedicated work of their 600,000 staff.

CST supports schools with sector-leading guidance and support, including resources to help school business leaders support their trusts.



[cstuk.org.uk](https://www.cstuk.org.uk)



Advocating for school trusts.

As the national organisation and sector body for school trusts, CST regularly meets with government, policy makers, and thinkers to advocate for the sector. CST respond to consultations on behalf of trusts, making sure your voice is heard on issues including the [school support staff negotiating body](#), [pensions](#), [artificial intelligence](#) and [safeguarding](#).



Briefing emails three times a week.

CST updates member trusts with the latest sector news every Monday, Wednesday, and Friday during term time through our email briefings. Staff at member trusts can [sign up for a personal MyCST account](#) to manage their email subscription and access resources on our website.



Professional communities to network and share knowledge.

CST's 11 [professional communities](#) cover core roles in school trusts, including [finance](#), [operations](#), [people and culture](#), and [communications](#).

Community membership is part of your trust's membership and gives access to our discussion forums, termly online meetings, and discounted access to [in-person conferences](#).



Guidance and resources to help you do your job.

CST has an extensive library of guidance notes, discussion papers, and tools to help trust leaders deliver.

Useful guidance includes our [school funding landscape overview](#), extensive briefings on the [Schools White Paper](#), and practical advice on [school trust mergers](#).



Topical webinars to understand emerging issues.

Our [fortnightly member engagement meetings](#) provide a forum to share sector intelligence and hear your voices on live issues in the sector. These are supplemented by webinars on diverse topics ranging from [estates strategy](#), and [finance](#), to [staff restructuring](#).

The voice of school trusts



Useful resources

Better Collaboration, Better Outcomes



nEdEx is a national, free to join, network association for School and Trust leaders; championing collaboration and innovation in the education sector.



1700+ School & Trust Leaders



Conferences & Roundtables

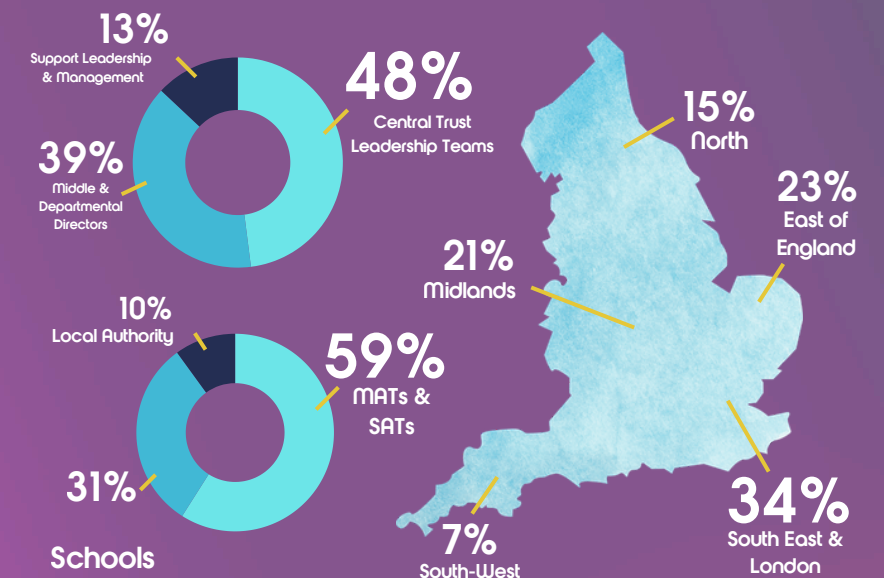


Advisory Board Led Practice

nEdEx is a Proud Partner for Academic Year 25/26 of:



A national network with national reach:



Jen Elliott
Chair of Advisory Board



Matt McDermott
Head of nEdEx

Powered by an advisory board of education leaders:



Carla Whelan
CEO
Empower MAT



Sash Hamidi
CEO
The Pegasus Partnership Trust



Paul Evry
CFO
Mosaic Partnership Trust



Howard Nelson
CFO
Keys Academies Trust



Colette Firth
CEO
Spirit Federation



Ben Stickley
CEO
SECAT



Andy Riches
CEO
Inspiring Primaries Academies Trust



Nick Osborne
CEO
Maritime Academy Trust



Sarah Sawford
Hub Business & Ops Manager
Minvera Learning Trust



Tim Plumb
CEO
PolyMAT



Marie Sweetlove-Smyth
CEO
Fortis Trust



Lauren Wilson
Head of Brand Strategy & Partnerships
TSAT

Useful resources



Department
for Education

Maximising value for pupils: guidance for schools and trusts

Guidance, support and a policy document for schools and trusts to maximise value from resources, ensuring every pound delivers for children.

From: [Department for Education](#)

Published 4 December 2025

The guidance and policy document on this page:

- support schools and trusts to maximise value from resources
- describe the government's policy on helping schools and trusts plan and manage resources effectively through 4 key pillars:
 - commercial
 - assets
 - workforce
 - developing capability, including digital and technology

Contents

- [Maximising value for pupils: policy paper](#)
- [Pillar 1: Commercial](#)
- [Pillar 2: Assets](#)
- [Pillar 3: Workforce](#)
- [Pillar 4: Developing capability, including digital and commercial](#)

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

Maximising value for pupils: policy paper

Sets out how government will work with schools and trusts to maximise value from resources, ensuring every pounds delivers the best outcomes for pupils.

[Maximising value for pupils](#)

4 December 2025 Policy paper

Pillar 1: Commercial

Information about the range of support available to schools and trusts to buy goods and services, get better value and be compliant with procurement regulations.

[Achieving better value when buying](#)

4 December 2025 Guidance

Pillar 2: Assets

Information about the range of support available to schools and trusts to maintain, improve and use their financial and physical assets effectively.

[Maximising school and trust resources: managing financial and physical assets](#)

4 December 2025 Guidance

Pillar 3: Workforce

Support for schools and trusts to plan their workforce, recruit effectively and develop staff to meet pupils' needs.

[Strategic workforce planning for schools and trusts](#)

4 December 2025 Guidance

Pillar 4: Developing capability, including digital and commercial

Information about the range of support available to schools and trusts to build capability, improve commercial expertise and meet digital standards.

[Improve your school's and trust's digital and financial planning](#)

4 December 2025 Guidance

Useful resources



Help is here... for School Business Leaders

The SBL Support Hub was created as a practitioner-led space where school business professionals can seek advice, share experience and access practical guidance from colleagues across the sector.

School Business Leaders frequently operate at the centre of complex operational challenges, balancing finance, estates, HR, compliance and organisational change. While many of these responsibilities are shared across the profession, SBLs often work in relatively small teams and may have limited opportunities to discuss challenges with peers in similar roles.

School Business Leaders are strong, resilient and adaptable but there are times when we all need support, direction, or just a shoulder to cry on. At SBL Support Hub, we've been there.

The SBL Support Hub aims to address this by bringing together experienced practitioners who understand the realities of the role and can offer practical insight and support. Through professional discussion, shared experience and peer advice, colleagues are able to explore practical approaches to common challenges such as workload pressures, operational priorities and leadership responsibilities.

 **0330 223 7302**

 **help@sblsupporthub.com**

 **www.sblsupporthub.com**

SBL Wiki

[CLICK HERE](#)

Alongside peer discussion, the Hub supports the development of the SBL Wiki, a practitioner-driven knowledge resource designed to capture and share practical guidance across the profession.

In many schools, knowledge about how systems, processes and responsibilities operate is held by individuals rather than documented in one place. The SBL Wiki aims to act as a shared professional reference point, capturing the collective experience of School Business Leaders and making

that knowledge more accessible to others across the sector.

By making this shared knowledge easier to access, the resource aims to support colleagues navigating the complexity of the role and reduce the professional isolation that can arise in smaller teams.

The Wiki brings together practitioner insight across areas such as:

- Financial management
- Estates and compliance responsibilities
- Procurement
- Governance
- HR processes
- Digital infrastructure



Recommendations for further support:

Creating Value in Schools

Creating Value in Schools provides articles, discussion prompts and practical resources exploring leadership, sustainability and operational effectiveness in education settings.

www.createvalueschools.com

Digital Confidence for Education

Digital Confidence provides practical guidance and tools to help schools and trusts strengthen their approach to digital leadership and governance.

www.digitalconfidence.education

Useful resources



Education Mutual are the recommended provider of staff absence protection by NAHT.

We're proud to provide schools and trusts with staff absence protection with personalised whole school wellbeing and leadership support. NAHT members can design their staff absence protection to best suit your schools' priorities and financial requirements, enjoying the additional benefits below:

- ✓ Access to health, wellbeing and lifestyle advice
- ✓ Whole school wellbeing and leadership support
- ✓ One whole school wellbeing day for your school
- ✓ 5 days absence cover for NAHT CPD days when supply cover is engaged
- ✓ Staff absence protection for your school or full MAT/academy

Join NAHT

NAHT is the largest union for leaders in education.

Members hold leadership positions in:

- ▶ early years and primary schools
- ▶ independent schools
- ▶ secondary schools
- ▶ special schools and pupil referral units

NAHT welcomes into full membership all education leaders from both academic and managerial grades within educational professions in England, Wales, Northern Ireland, the Channel Islands, the Isle of Man and Scotland.

[Join NAHT now](#)

[Current new member offers](#)

[Request a quote for staff absence protection](#)

NAHT's priority campaigns

Following extensive consultation with NAHT members, including regional officials and national executive members, six key areas have been identified.

Click on each area to find out more.



Advice and support

NAHT's team of specialist advisers has created a series of guides for NAHT members on key topics and issues for school leaders. Below are some of the most popular titles at this time in the school year

Click on each category to find out more.

Funding

[A guide to school funding and the pupil premium](#)
[Budget deficits and how to manage them \(Wales\)](#)

Pay, pensions, and conditions

[School business leader pay and grading](#)
[Calculating continuous service in schools](#)

Management

[Artificial intelligence \(AI\) in education](#)
[A guide to running a small school](#)

Pupil support and safeguarding

[10 top tips for SENCos](#)
[Keeping children safe in education 2025](#)

Model policies

[A model dignity at work policy for school leaders](#)
[Menopause and a model menopause policy](#)

Structures, inspections and accountability

[Forced academisation](#)
[NAHT's Ofsted inspection risk assessment framework](#)

Useful resources



unbarrier me

supporting School Business Leaders with technology.

reducing cognitive load, protecting time, and making the day more manageable.

School Business Leaders don't just manage workload – they manage constant switching, interruption, and responsibility.

the challenge isn't just time. it's the cognitive load of holding everything at once. the tools already exist in most school ecosystems. the shift is using them to reduce friction, not add more.

quick wins (start this week).

- block 30 minutes of focus time
- turn off non-essential notifications
- use AI to draft one task
- create one reusable template
- move one process into a form
- replace one meeting with an update
- capture tasks in one place

creating boundaries and protecting your time.

Digital

- turn off non-essential notifications
- use "Do Not Disturb"
- schedule emails

Personal

- label protected time clearly
- be unavailable when needed

cognitive load – why the day feels so full

this role requires you to:

- switch between finance, HR, and estates
- respond to issues as they arise
- hold multiple decisions in your head

what actually helps:

- stop using your inbox as your to-do list
- use [Microsoft To Do](#) or [Google Tasks](#) (taggable, shareable, collaborative)
- refine and organise using [Copilot](#) or [Gemini](#)
- build a simple bank of reusable emails, reports, and processes

reduce the load - use what you've got

most pressure isn't the task, it's the thinking behind it.

reduce cognitive load by:

- automating what repeats
- filtering what arrives
- standardising what you decide



Try ([Power Automate](#) / [Apps Script](#))

email - the biggest hidden drain

most SBLs are managing their day through their inbox. that's where decision fatigue builds fastest.

what to change:

use built in AI to:

- summarise threads
- draft replies
- extract key actions

Use rules and filters to:

- auto-label (Finance / HR / Safeguarding)
- reduce noise
- prioritise what matters

Useful resources

a tool worth exploring:

NotebookLM - Google NotebookLM

there are a lot of AI tools. most add noise. this one is different.

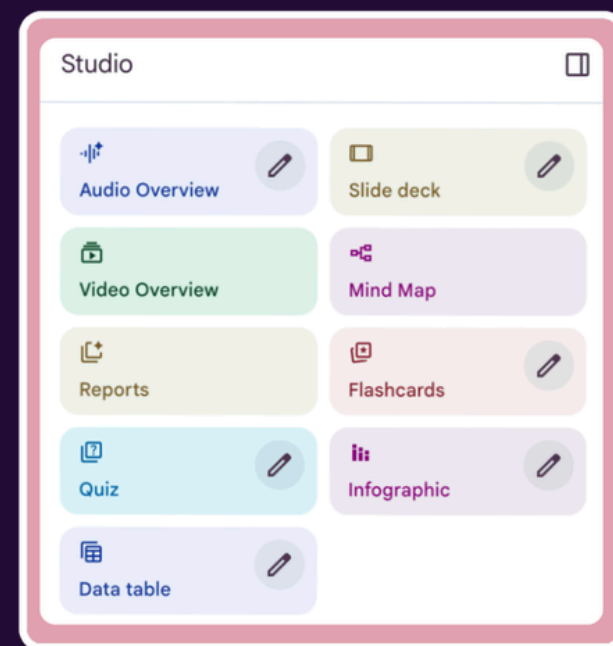
what it actually does

NotebookLM helps you work with your own materials:

- ask questions
- summarise
- extract actions
- create usable outputs

what you can bring into it

- policies and internal documents
- meeting notes or transcripts
- webpages (DfE guidance, frameworks)
- YouTube videos (briefings, training)



what this looks like in practice

meetings → upload notes or transcripts → extract decisions and actions

policy writing → upload policies + guidance → identify changes and rewrite

use safely in schools

use for:

- policies and general documents
- training
- non-sensitive materials

do not upload:

- EHCPs
- safeguarding records
- personal data

stay in your ecosystem

you don't need more tools – just better use of what you already have.

from one set of documents, you can generate summaries, reports, slide decks, and visual outputs – reducing the need to re-read and restructure information manually.

Microsoft 365

- focus time → protected, interruption-free work
- quiet time → no after-hours notifications
- Weekly insights → see where your time goes
- copilot → draft, summarise, capture actions

Google Workspace

- calendar focus time → protect key work
- gemini → draft, summarise, and question
- shared docs → collaborate without email chains
- Keep → quick capture linked to your workflow



“It’s not just the workload – it’s the constant switching, interruption, and responsibility. The real pressure is the mental load that builds throughout the day. The biggest shift comes from reducing that load and creating space to think.”



unbarrier me

Nicola Foote

Inclusion, Accessibility & Digital Strategy Specialist

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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/>



For any enquiries about staff absence protection or to learn more about the wellbeing support included within an Education Mutual membership at no additional cost, please contact:

 **01623 287840**

 **learnmore@educationmutual.co.uk**



Confederation of School Trusts (CST)

The sector body and employer body for school trusts

CST is the national organisation and sector body for academy trusts. Its members educate more than four million children through the dedicated work of their 600,000 staff. CST believes school trusts offer the best model for improving education because they uniquely unite schools in organisations with a strong, single purpose: education. This encourages the sharing of expertise, ideas, and resources to give pupils a better start in life.

 cstuk.org.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/>



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/>



Network for Education Excellence (nEdEx)

The Network for Education Excellence is a free to join education network. Launched only this academic year, nEdEx already represents over 150 trusts and 1,700 schools in the UK. nEdEx provides thought leadership, live webinars and in-person conferences that help education leaders in the challenges that matter most.

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



National Association for Head Teachers (NAHT)

NAHT is the UK's largest union for school leaders, democratically run to provide representation, protection, and a voice for members to help create a better education system.

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



SBL Support Hub

The SBL Support Hub is a practitioner-led support service created to support school business leaders (or whatever your title maybe) through shared experience and practical guidance.

<https://sblsupporthub.com/>

Section 7

Appendices

Appendices

Appendix 1:

Work-related factors impacting on mental health and wellbeing, by phase

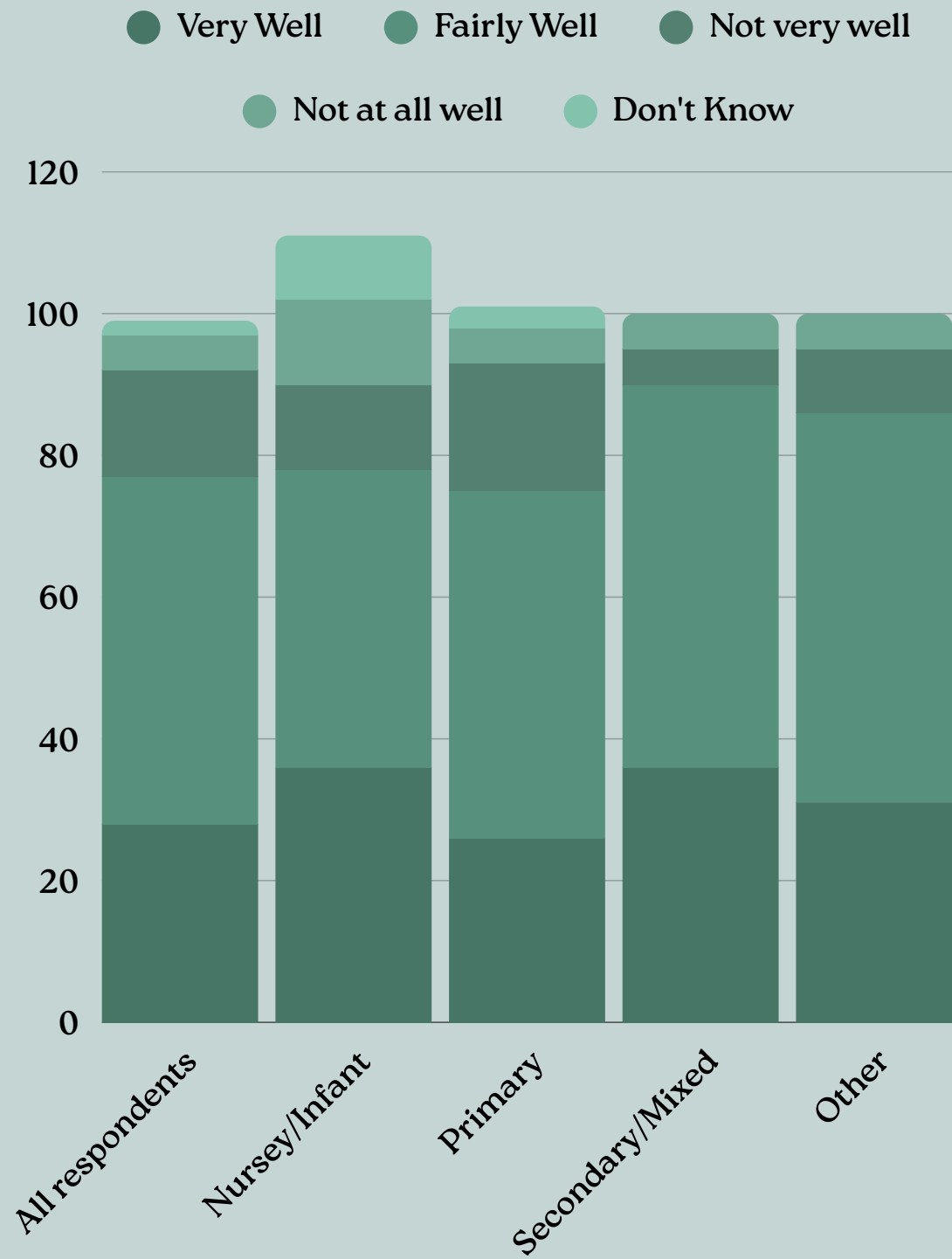
Base: all respondents (n=472)

Challenge	Academies	Local authority / maintained
Excessive workload	62%	66%
Lack of understanding from others about my role	50%	62%
Funding issues	47%	64%
Lack of work/life balance	37%	34%
Long working hours (unpaid)	37%	42%
Problems with staffing	35%	41%
Inequitable pay	30%	37%
Financial reporting/accountability	29%	31%
Government legislation/compliance	29%	23%
Provision for pupils with special needs	20%	38%
Low income	20%	26%
Inspections	17%	22%
Not able to take annual leave	14%	22%
Problems with pupils' parents	11%	27%
Unreasonable demands from manager	11%	8%
Redundancy/restructure	11%	27%
Poor pupil behaviour	9%	13%
Safeguarding	8%	10%
Addressing the educational disadvantage gap	8%	7%
Lack of trust from manager	8%	6%
Lack of opportunity to work independently	5%	7%
Bullying by colleagues	3%	5%
Teacher strikes	3%	2%
Discrimination	2%	1%
Poor communication	2%	<1%
Board/Trust intervention	2%	<1%
Other	1%	1%
None of these	5%	2%

Appendix 2:

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

Base: all respondents (n=472)



Appendix 3:

Mental health and wellbeing services provided and used

Base: all respondents (n=472)

Service	Provided	Used
Employee assistance programme (a confidential helpline)	63%	11%
Counselling/psychotherapy - online or in person	50%	13%
Mental health first aid training	41%	7%
HR staff we can talk to	41%	15%
Union people we can talk to	35%	5%
Wellbeing sessions	29%	12%
Health-related support staff we can talk to	16%	5%
Mentoring/coworker support schemes	23%	8%
Individual supervision as professional support provided outside of the line management relationship	17%	8%
Professional coaching	21%	12%
Animals in the workplace	15%	4%
Training on common mental health conditions	14%	3%
Exercise classes, groups or programmes	16%	7%
Resilience, energy or stress management classes/programmes	8%	-
Mindfulness classes or programmes	11%	4%
Facilitated peer support group	9%	2%
Massage or relaxation classes or programmes	7%	2%
Education Mutual contract/services	2%	-
Management/colleague support	2%	1%
Employment lawyer	-	-
Other	2%	1%
None	2%	38%

Appendix 4:

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

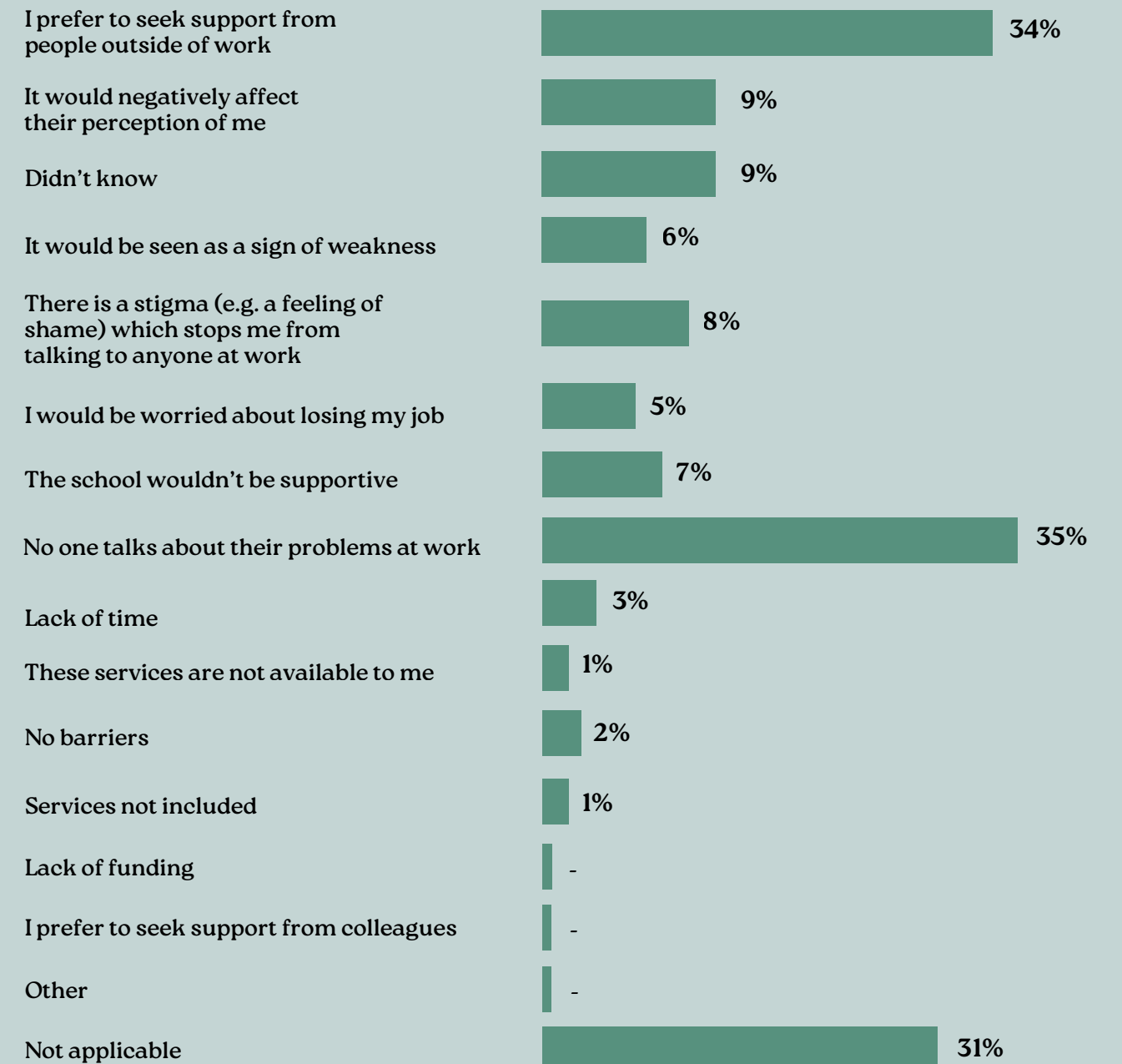
Base: all respondents (n=472)



Appendix 5:

Barriers to using or accessing services that were available

Base: all respondents (n=472)



Appendix 6:

Methodology

This research study investigated the wellbeing needs of School Business Leaders working in academies which 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 which involved:

- 472 online survey responses from SBLs working in schools in England and Wales. The survey was open for completion during the period Wednesday 17th September until Sunday 19th October 2025. Incentives were offered to take part.
- 6 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.

Appendix 6 - Table 1 - Job Title

	Number of respondents	Proportion
School Business Leader/Manager/Director	306	65%
Office Manager/Director	50	11%
Finance Manager/Director	22	5%
Administration/PA/Secretary/Officer	19	4%
Bursar	16	3%
HR Manager/Director	15	3%
Headteacher/Principal, Deputy or Assistant Head Teacher/Principal	15	3%
Operations Manager/Director	14	3%
CEO, CFO	8	2%
Facilities Manager/Director	3	1%
Other	2	<1%
Not answered	2	<1%

Appendix 6 - Table 2 - Tenure

	Number of respondents	Proportion
0-2 years	76	16%
3-5 years	137	29%
6-10 years	117	25%
11-20 years	106	22%
21-30 years	26	6%
31+ years	6	1%
Not answered	4	1%

Appendix 6 - Table 3 - Gender

	Number of respondents	Proportion
Male	26	6%
Female	442	94%
Non-binary	-	-
Prefer not to say	1	<1%
Not answered	3	1%

Appendix 6 - Table 4 - Age

	Number of respondents	Proportion
Less than 25	-	-
25-29	5	1%
30-34	11	2%
35-39	30	6%
40-44	60	13%
45-49	84	18%
50-54	109	23%
55-59	117	25%
60-64	47	10%
65+	5	1%
Prefer not to say	1	<1%
Not answered	3	1%

Appendix 6 - Table 5 - Ethnicity

	Number of respondents	Proportion
Any Asian background	4	1%
Any Black background	2	<1%
White - English, Welsh, Scottish, Northern Irish or British	411	87%
White - Irish	11	2%
White - Gypsy or Irish Traveller	2	<1%
White - Roma	4	1%
White - Any other White background	13	3%
Any other ethnic ground - (includes Arab, Mixed and other)	1	<1%
Prefer not to say	3	1%
Not answered	18	4%



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Published by Education Mutual

The sole purpose of this report is to present research findings and insights relating to the wellbeing of School Business Leaders. This publication should not be considered a comprehensive statement of all relevant data, policy, or practice in this area. The findings are based on survey responses and voluntary participant interviews, and the data is collated, analysed and reviewed by an independent third-party research company commissioned for this project.

Its purpose is to share insights into current issues within the education sector and to help highlight the experiences and perspectives of School Business Leaders. While every effort has been made to ensure the information is accurate at the time of publication, we cannot guarantee its completeness, accuracy or continued relevance, including any external links referenced.