

SUPPORTING INDEPENDENT SCHOOLS

**ISBA**

INDEPENDENT  
SCHOOLS' BURSARS  
ASSOCIATION



**Sharing the knowledge**  
2024 Impact Report

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

# Comprehensive support for independent schools

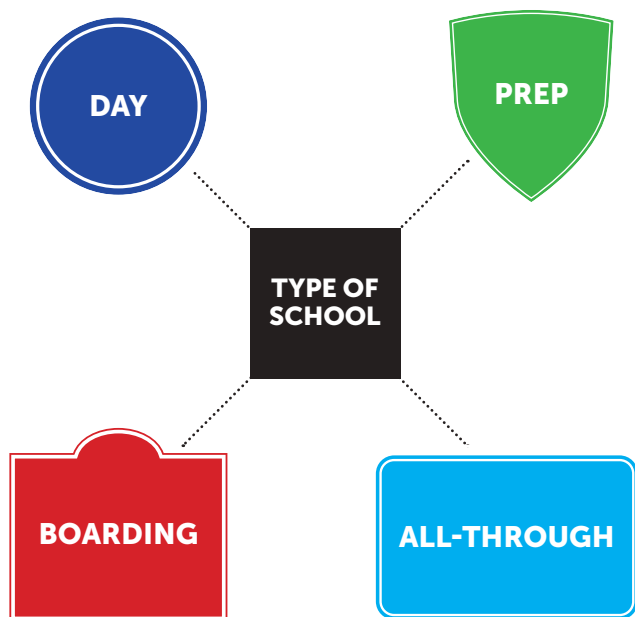
Welcome to the Independent Schools' Bursars Association's (ISBA) Impact Report 2024. This impact report is designed to give our stakeholders an overview of the outcomes of ISBA's charitable activities.

With more than 1,200 member schools, we are the largest constituent association within the Independent Schools Council (ISC). We have been supporting the business of independent schools for 92 years.

As a charity we aim to advance education by promoting best business practice in the independent school sector and by equipping bursars and their teams with the skills needed to run the business activities of independent schools. Our valued services enable our member schools to provide an outstanding education to pupils at home and across the world.

Our members range from small preparatory schools to large, well-renowned senior schools, day and boarding schools, in the UK and internationally. Whilst every individual school's needs will be different, they all have one need in common: access to timely, reliable, and practical operational guidance. This is where ISBA's services play a key role, supporting bursars and senior management teams to ensure their school functions to its full potential for the benefit of pupils, staff, parents, and society at large. Our comprehensive advice and guidance services, digital apps and our bespoke professional development training enable our members to tackle financial, operational, and regulatory challenges with knowledge and confidence.

We have a highly dedicated team who advise many different staff within member schools' senior management teams whether they are the bursar, finance director, operations director, chief operating officer, business manager, deputy or assistant with areas of responsibility encompassing accounting, financial management and reporting, risk management, regulatory compliance, safeguarding, data protection, catering, facilities and estates management, HR, technology, anti-money laundering or environmental sustainability. The list is not comprehensive but is ever lengthening.





The two years since our last impact report have brought a number of the issues facing independent schools into sharp focus, threatening their business resilience in the short, medium, and long-term. Schools recovering from the financial after-effects of Covid are now seeing the squeeze on operating costs with an ongoing energy crisis, high inflation, and parents impacted by lower wages and the rising cost of living. The multitude of challenges for schools has intensified further with the prospect of a probable change of government and the indicated imposition of VAT on school fees paid by parents and loss of charitable mandatory business rates relief.

More than ever before, our independent schools need reassurance and guidance they can depend on. As this impact report will show, ISBA has strengthened its ability to deliver exceptional support to its members at this time through the expansion of its own team and the development of exciting new services.

ISBA continues to lead the sector in its response to unforeseen changes in government policy, particularly where those changes are likely to have an impact on the finances and operating environment of independent schools.

In addition to the £130,000 investment (so far) in bespoke advice and online guidance for members on the issue of VAT on fees, the association has continued its work to assist schools in accommodating the second, sharp rise in the employer's contributions to teachers' pensions and to support schools as they consider options for pension provision for their staff. To date 337 independent schools have opened defined contribution pension schemes with APTIS – the sector specific pension scheme we set up with Aviva – and APTIS continues to receive a reassuringly steady number of enquiries.

The association provides frequent input to the Independent Schools' Council, of which ISBA is a constituent member, when responding jointly to government consultations and in discussions, at ministerial level, with the Department for Education, HM Treasury, and other key stakeholders, including the All-Party Parliamentary Group on Independent Education, and in supporting initiatives such as partnership working.

Read on to discover exactly how ISBA's work has impacted independent schools in these uncertain times, helping them continue to deliver a remarkable education for their pupils.

## Our mission

The objects of the Charity are 'the advancement of education by the promotion of efficient and effective financial management, administration and ancillary services at independent schools in so far as it is charitable to do so'.

## Our vision

*We are improving standards of business leadership, management, compliance, knowledge and professionalism across the independent school sector.*

*We are delivering and evolving ISBA's professional development, communications and advice services to member schools into a coherent, nationally recognised structure.*

*Driven by pan-sector and multi-discipline thought leadership, our services inform, educate and support school staff across the sector.*



## What does this mean?

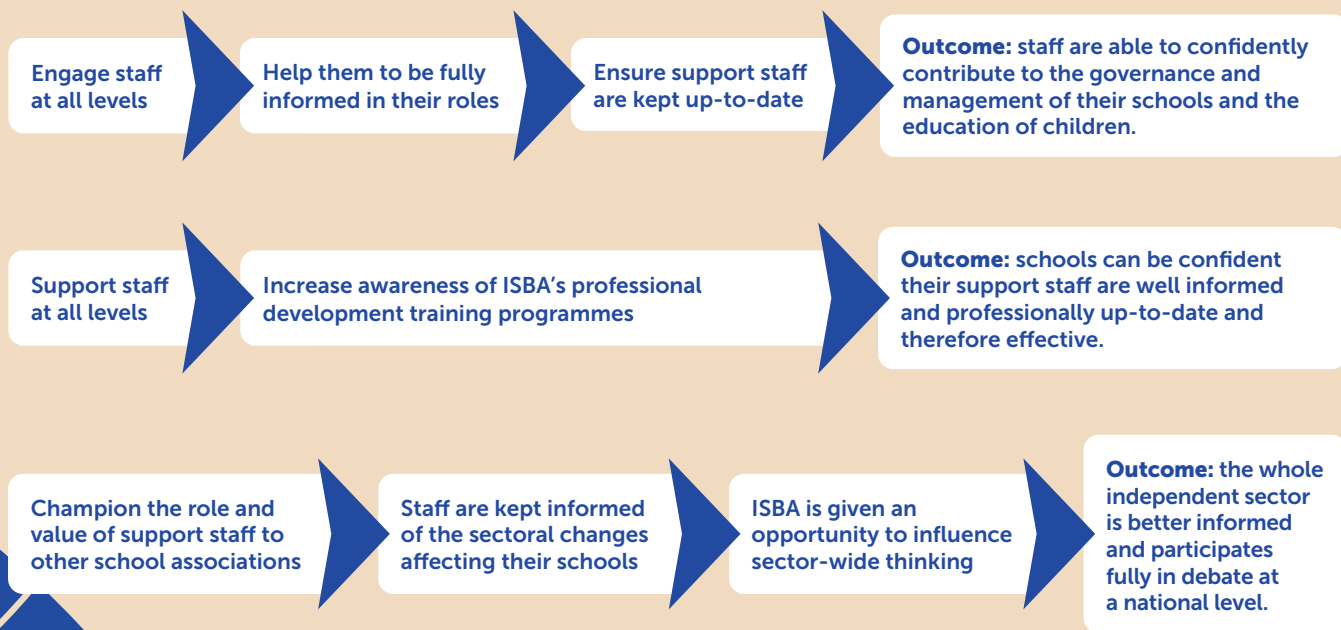
*ISBA is the trusted national voice and first choice provider for independent school business support.*

*ISBA offers pro-active and timely operational advice and business services for bursars and senior management staff.*

*ISBA is firmly in the 'business of independent schools' whatever their individual needs.*

## We believe...

- Senior management staff in independent schools deserve timely, accurate and informed operational, financial and regulatory guidance to provide the finest educational experience for pupils and parents.
- ISBA's training and support services should educate, equip and empower staff in schools to achieve their professional and personal goals for the benefit of all.
- School support staff who function to their full potential contribute to excellence in practice for the sector as a whole.



*ISBA is a charitable company limited by guarantee and although it is the school and not the bursar which is the member of the association, it is usually the bursar or equivalent who is the school's nominated representative.*



## Message from the chair, Neil Cufley

It hardly seems possible that two years have passed since ISBA's last impact report, where we detailed the outstanding achievements of the association in delivering a range of services for member schools during COVID-19. Since emerging from the pandemic in a position of strength ISBA has been able to continue building upon its reputation both within and outside of the sector, and further expand its offering to member schools – new services such as ISBA Recruitment, ISBA's inspections app, and the association's data navigator benchmarking tool are just some of the innovative member benefits which are highlighted in this report.

With ISBA the recognised first point of call for schools seeking advice, and strategic guidance and training, the association is embracing technology and the rapidly developing opportunities

that AI presents in order to offer increasingly relevant, timely and cost-effective services for members. This, together with the assurance that there will always be a real person, experienced and up-to-date, to speak to at the end of the phone, means school bursars and senior managers have access to comprehensive support at the times they need it most.

As a bursar since 2013, I have seen how the past decade has dramatically changed the operating landscape for independent schools and, with the immediate future looking likely to throw up yet further socio-economic and political challenges, there is no doubt in my mind that the positive impact ISBA achieves will become ever more important. Indeed, as you will read in this report, the association's advice and guidance helpline answered close to 4,000 queries from bursars and their teams during 2022-2023. Nearly 13,000 independent school staff attended our webinars and in-person training events in the last two years and a further 2,488 joined us at regional group meetings to share their experiences and knowledge with a supportive and welcoming cohort of like-minded peers.

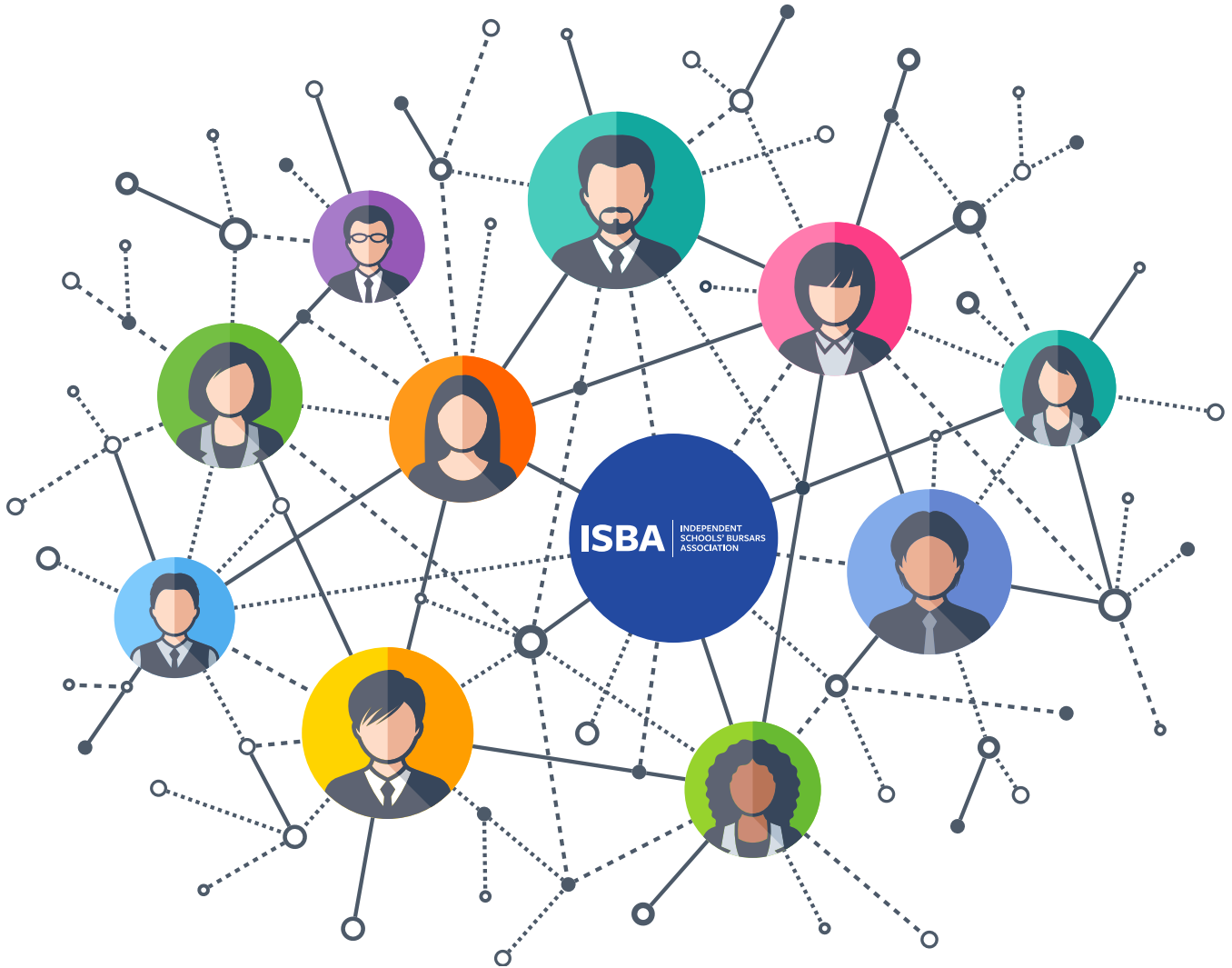
I know that the ISBA team share the values of their members across the UK and the world, and work incredibly hard to assist our member schools in providing an extraordinary education to pupils throughout the sector. I'd like to take this opportunity to thank the team for all they do and recognise how positively they are viewed by those they support.

In such uncertain times it is heartening to see how our schools continue to ensure pupils thrive and achieve their potential, and that the association can proudly point to its role standing alongside its members to enable their success.

### **Neil Cufley**

*Chair of ISBA and director of operations and finance at Royal Russell School*





The assurance that there will always a real person, experienced and up-to-date, to speak to at the end of the phone, means school bursars and senior managers have access to comprehensive support at the times they need it most.



## Message from the chief executive, David Woodgate

2023 has seen ISBA serving the largest number of member schools in its history. 1,262 schools are now in membership of the association and have come to rely on ISBA as a source of expert guidance, professional development, and supportive community.

The association's dedicated team is also larger than it has ever been – at 21 colleagues currently – and we work closely together to deliver a truly astonishing comprehensive output for independent schools across the UK and the world.

Whether a bursar is seeking an answer to a pressing operational question, wishes to join a training event or a regional group meeting, access our new inspections app or data navigator benchmarking tool, download a template contract from our online reference library, read our latest bulletin or magazine, or join our new mentoring scheme there is now an even greater number of ways they can benefit from our services.

Developing people, products and services to enhance the business effectiveness of member schools is one of ISBA's core objectives and listening to the feedback of our members has enabled us to not only expand but also tailor our offering to schools. In this vein, we have established an end-to-end

ISBA Recruitment service which not only offers a permanent or interim recruitment solution for a school but also assists with training (through our 'So You Want to be a Bursar' and New Bursars' courses) and now mentoring too. Few others are better placed in the sector than ISBA to not only understand the specific operational needs of independent schools but also offer such comprehensive support packages. In 2023 alone ISBA Recruitment placed 12 permanent bursars and 37 interim bursars in schools.

In this (our fourth) impact report, we'll explain how we invested the income we received from membership fees and other sources over the past two years and outline the services we developed for schools between January 2022 and January 2024. We'll highlight how ISBA leads on support for both the strategic issues and the day-to-day operations for schools, and aims to shape the business direction of a sector which now educates 554,243 pupils, up from 544,316 in 2022. Despite the challenging times, that very same sector provided fee assistance worth over £1.2bn in 2023 — an increase of 5.9 percent.

As we look ahead, ISBA will continue to support its members to be efficient and effective and to focus ultimately on the benefits they provide to wider society. Regardless of what the future may bring, our mission will remain to be a steadfast enabler of the independent school sector.

**David Woodgate**  
*Chief executive, ISBA*



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# Sharing the knowledge

## 2019-2020 Impact Report

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# Sharing the knowledge

## 2022 Impact Report



# Sharing the knowledge

## 2024 Impact Report

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



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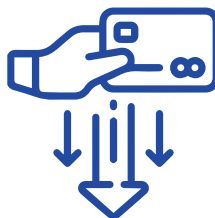
# Year of impact figures for year ended 31/12/23



**Total Income –**  
£2792k comprising:  
Membership – £1146k  
Annual Conference  
(including sponsorship  
and exhibitors) – £1646k



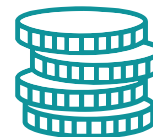
**Other Income –**  
Bursar's Review – £62K  
Supplier Directory – £111k  
Recruitment – £176k  
Training – £248k  
Dividends – £30k  
**Total – £627k**



**Total Expenditure –**  
Outputs to sector – £3046k  
Overhead (audits and  
professional fees) – £35k



**Investment Gains –**  
£52K



**Surplus –**  
£425K

Following the disruption wrought by the pandemic, demand for ISBA services has increased still further. The association manages its cash flow carefully and tries to ensure that its pricing for paid-for services remains as affordable as possible for the greatest number of independent schools. Surpluses generated are reinvested in services for members such as the free inspections app which is proving a useful and popular resource for members (more than 800 schools have signed up to use it to date). The association maintains a prudent reserves policy to ensure that we can continue to provide pan-sector advice on current and emerging issues and to provide timely, accurate and implementable advice on political, economic, and operational challenges facing our member schools, and to develop member services whether in number, or in type, and maintain an appropriate cash reserve to face up to future demands on resources.

Recent examples include the costs of advice on TPS, and the probable imposition of VAT on the fees paid by parents. The running total spend on TPS advice is currently about £420k, and advice on VAT on school fees stands at about £130k to date.

These forms of expenditure are only made possible by the cash flow underpinning our reserves that comes from our membership

subscriptions, the annual conference, and the diverse range of other commercial activities the association is now engaged in.

We reinvest our income into services and support to members. As a trusted adviser to schools, the last two years have seen our team grow considerably to reflect the increased demand for assistance from members. In 2023 we welcomed the addition of a new head of advice and guidance as well as a head of recruiting and administrative support to manage the personnel centred processes (recruitment, interim appointments, and mentoring) which are now part of the ISBA outputs. In 2024, a new head of compliance will also join ISBA to increase the resources we have available to deliver exceptional advice and guidance services to members.

There is ISBA leadership of the cross-association Sustainability Working Group and we run two working groups – one monitoring the quality and output of inspections and the other on equity, inclusion, and diversity in the sector.

Investment of income and the efforts of our experienced and dedicated staff have enabled us to deliver 86 individual webinars, two annual conferences for all members, two conferences for our Scottish schools, eight in-person one-day conferences,



six strategy days and three online e-learning courses, providing professional development (PD) training to 12,953 independent school staff in the last two years. A further 33 training and support sessions were delivered as part of our New Bursars' course and 128 regional group meetings provided information

to an additional 2,488 attendees. Senior ISBA staff have also provided an increasing number of strategy presentations to boards of governors to assist them in developing responses to strategic threats and looking at specific issues such as how to respond to the challenges of TPS consultation.



# Professional development

ISBA aims to advance education by developing the skills and knowledge of independent school bursars and support staff. We offer them the professional development training they need to stay on top of the challenges affecting independent schools today.

## ISBA annual conference 2022

After the disruption that COVID-19 caused to in-person events, 2022 saw member schools welcome back ISBA's conference to its regular slot in the annual calendar in May, when they benefited from the many training and networking opportunities on offer at the event. From 16 May to Wednesday 18 May 2022, around 500 delegates joined us at the International Convention Centre in Birmingham together with 148 exhibitors and sponsors.

In addition to seven keynote sessions, delegates were given the opportunity to choose from 18 breakout sessions, presented by 49 speakers, covering a wide range of issues relevant to bursars and senior managers from all types of schools.

## ISBA annual conference 2023

In the following year we held our biggest annual conference to date, from 23 to 25 May 2023 at Manchester Central, welcoming nearly 600 delegates and 181 suppliers to the sector who showcased their products and services in the largest exhibition we have ever offered to schools.

The conference was extended by an additional half day to facilitate an afternoon of personal development that covered all aspects of relationship building and authentic leadership, through the lenses of personal impact, influencing and networking. One delegate described this session as a *"superb icebreaker and enabled us to all meet bursars we didn't know previously"*.

Throughout the remaining two days delegates took inspiration and knowledge from four keynote sessions and a choice of 20 breakout sessions delivered by 53 expert speakers.

86 percent of delegates rated the overall delivery of the breakout sessions in the professional development programme for the annual conference 2023 as 'good' or 'excellent'.



**"This was my first conference and I think the organisation and venue were excellent. Most of the topics and content were expected, given the financial climate we are in, but were delivered very well and about the right length for each session".**

Delegate at ISBA's annual conference 2023

**"A very well organised, informative and thoroughly enjoyable conference".**

Delegate at ISBA's annual conference 2023





**“A really good mix of personal development, interesting topics and useful to get a point of contact at the necessary exhibitors, to help put things in place at our school”.**

delegate at ISBA’s annual conference 2023

181 exhibitors, which included six information stands from sister organisations such as AGBIS and Royal Springboard and 20 conference sponsors, offered a broad range of services to schools during the event’s large exhibition and feedback from delegates, sponsors and exhibitors was extremely positive.

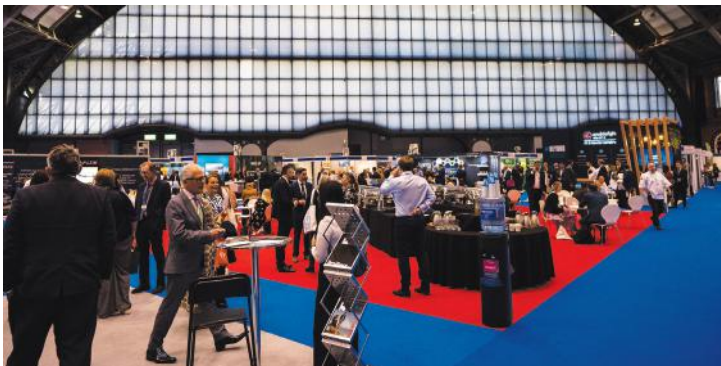
**“It was an excellent introduction to the ISBA conference and its members. We met with both existing and new customers; we would be delighted to attend next year”.**

2023 conference exhibitor



**“All in all a great event, very well organised and a pleasure to be a part of”.**

2023 conference exhibitor



**“The ISBA conference is without doubt the most professional conference we have attended over the past 20 years of being in business”.**

2023 conference exhibitor





# Webinars and in-person training events

Following COVID-19, we have continued to deliver the majority of our training and CPD online. In 2022 and 2023 we offered our professional development programme to members virtually via 86 webinars. Throughout these last two years our webinars have trained 9,766 staff and provided them with practical guidance to successfully tackle the operational challenges they have been facing in their schools.

2023 webinar topics included being strategic with cross-sector partnerships, the new Protect Duty Bill, AI text and image generators, digital strategy, pensions updates, insurance renewals, parent contract guidance, how to optimise school assets, reputation management, employment law, managing long-term ill-health, SEN and disability, biodiversity net gain, business rates, UKVI sponsor licences and much more.

Three webinars were also held with associations AGBIS and HMC on sector threats and challenges for schools and,

in October and November 2023, we ran a series of six online live webinars to deliver our safeguarding programme examining the unique role of bursars and their operational teams in keeping children safe.

We continue to place great importance and investment in maintaining and growing our network of professional advisers to the sector and we were pleased to work with 177 expert speakers who shared guidance with our many webinar attendees throughout 2022-2023.

We engaged with a select group of external providers in the sector to offer three online e-learning courses: logging and recording a major incident; cyber security and safer recruitment which welcomed 174 attendees in total.

For the safer recruitment course 95 percent of delegates scored 9 or 10/10 in response to the question 'on a scale of 1-10, how likely are you to recommend this course to a colleague?' (1 is not at all likely, 10 is extremely likely) and 92 percent responded that the course was pitched at the right level.

## In-person training

We held seven one-day training conferences for a total of 1,256 attendees in 2022 and 2023, as well as a joint conference with HMC and AGBIS in November 2023 during which we welcomed 216 head teachers, governors, and bursars as well as 22 speakers.

We also delivered six strategy days where 379 bursars and senior managers gathered together to share ideas and knowledge and hear the latest guidance on the operational issues they had in common.

**"I really valued all the practical advice on the single central register which was available in ISBA's safer recruitment course".**  
delegate on ISBA's safer recruitment course 2023







### ISBA 'So You Want to be a Bursar' course

In the last two years we have delivered six 'So You Want to be a Bursar' courses which inform potential new bursars of what working in the profession entails. 135 individuals joined us online to learn more about the independent education sector as a career and one attendee commented, "I really appreciated the first-hand feedback from bursars about their role in different types of schools, as well as the recruitment advice. I came away with some great tips to prepare for interview".

Another said the course was a "very informative session on the independent school sector, easy to access and offered helpful follow up suggestions".

### Professional development for new bursars

In 2022 and 2023 we ran 33 training and support sessions as part of our New Bursars' course (which supports those who have been recently appointed to a bursar role or who have been in post for two years or less) and these have proved ever popular with attendances shown below:

#### 2022:

- Cohort Five – 115 attendances and seven meetings.
- Cohort Six – 112 attendances and six meetings.
- Cohort Seven – 126 attendances and five meetings.

#### 2023:

- Cohort Eight – 123 attendances and five meetings.
- Cohort Nine – 77 attendances and five meetings.
- Cohort 10 – 69 attendances and five meetings.

*"Thank you so much for the really useful sessions we have had for cohort 10, I've found them informative and reassuring".*

Emma Bunting, bursar at Bute House

*"Thank you to you and the team for putting on the day, it was very informative, and a helpful opportunity for me to meet other bursars. As I have said with those I know locally, we have less in common with our target markets than we fear and more in common operationally that we can benefit from sharing".*

Richard Hennah, bursar at Windermere School

### ISBA regional groups

Engendering a professional community spirit is vital to helping support staff feel empowered in their schools. Opportunities to meet peers, maintain networks and share information can help staff develop knowledge and confidence for what can often be demanding and, at times, lonely roles. To support this, we arrange regional group meetings for schools across the country enabling members to communicate both face-to-face and online. We also provide information briefings tailored to each region at the meetings, allowing schools to pose questions directly to our advice and guidance team. In the last two years we held 128 regional group meetings welcoming 2,488 attendees in total.

*"My sincere thanks for all that is done by the East Anglia regional group (and through them ISBA, and the excellent briefings). Having worked only in industry before, the thought of having such a supportive mutual body is astonishing and the role of bursar is made much the more sustainable by it".*

Luke Graham, former bursar at Witham Hall School

**THE BURSAR'S REVIEW**  
Spring 2022 £4.99 The Official Magazine of the ISBA

## STUDENT SPONSOR LICENCES – PREPARING FOR HOME OFFICE INSPECTIONS

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**With this issue:** Supporting independent schools supplement – Target zero: Becoming a sustainable school (part 3) and: The ISBA impact report

- Why schools need to treat enterprise as a workplace issue Page 32
- Potential changes to data protection law and how they will affect schools Page 30
- Managing workplace conflict through mediation Page 40

ISBA

**ISBA ANNUAL CONFERENCE 2022**

the icc birmingham

- Professional development
- Breakout sessions and panel discussions
- 150 exhibitors

**PLUS:** Bestselling author and world-renowned thinker Richard Gerver tells us how we can start to think more clearly  
Former digital marketer Shivay Jervis looks at new technology in the pipeline for the next decade  
Adele Blakeborough, one of the UK's most influential social entrepreneurs, asks where independent education will fit in the future – as a business or as a charity?

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**THE BURSAR'S REVIEW**  
Summer 2022 £4.99 The Official Magazine of the ISBA

## MANAGING SCHOOL FINANCES IN TIMES OF STAGNANT ECONOMIC GROWTH AND RISING INFLATION

Page 10

**With this issue:** Supporting independent schools supplement – Target Zero: Becoming a Sustainable School Part 4

- Risk – the big picture for your school Page 16
- The growing problem of food allergies Page 26
- Is domestic abuse in the workplace a new employment issue? Page 50

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## STRATEGY FOR SCHOOLS IN UNCERTAIN TIMES

Page 8



**With this issue:** Supporting independent schools supplement – equal diversity and inclusion

- Sustainability and surging energy grid prices Page 46
- Business rates – what will the 2023 revaluation mean for independent schools? Page 62

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## MANAGING THROUGH UNCERTAIN TIMES



**Two supplements with this issue:**  
ISBA Sustainability Guide  
Finance and Risk in 2023 and Beyond

- Cost of living crisis and staffing considerations for schools Page 16
- How VAT on independent school fees would impact every family Page 24
- Business rates update – what will 2023 bring? Page 28
- Cyber threats in schools and the bursar's role Page 56

ISBA

**ISBA ANNUAL CONFERENCE 2023**

- Professional development
- Breakout sessions and panel discussions
- More than 180 exhibitors

**PLUS:** Leadership coach Chris Grimes tells us how to improve our personal impact and presence using confident and assertive communication skills, networking and leadership voice  
Journey Navigator and Anan Kananwar will look at the business and political environment and challenges facing us and suggest some possible responses  
Have you ever known what you're operating a safe school? David Smellie chairs a panel discussion on the governance of safeguarding  
Professor Joe Neill explores economic prospects and the impact on our sector

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## NEW STRATEGIC TOOL FOR SCHOOLS: ISBA'S DATA NAVIGATOR



- Cyber safety – ensuring your school mitigates its risk and has a fit-for-purpose insurance policy
- Alternative business models supplement included with this issue

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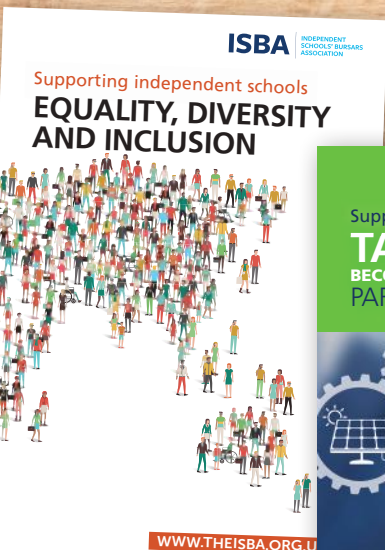
## ISBA MEMBER SCHOOLS TACKLE THE BIG ISSUES: EQUALITY, DIVERSITY AND INCLUSION AT BRADFORD GRAMMAR SCHOOL, SUSTAINABILITY AND THE NET ZERO JOURNEY OF CHERLE HULME SCHOOL



**Don't miss our special section included with this issue – Artificial intelligence: the future for schools**

ISBA





# Advice and Guidance Service

ISBA members benefit from our advice and guidance on a range of issues, helping them resolve the challenges facing them in the management of their schools. We provide tailored support for their queries through our telephone and email helpline, web forums, an extensive online reference library offering template policies and contracts they can download and adapt for their own school, along with a wealth of detailed briefing notes and, more recently, a brand new inspections app to monitor their school's inspections compliance.

## ISBA advice and guidance helpline

ISBA's advice and guidance helpline continues to answer high numbers of queries from members which we have noted reflect the knowledge we are sharing in our professional development training, and which have subsequently become more complex and intricate to answer. We responded to 3948 queries from bursars and their teams during 2022-2023.

The most popular topics we answered questions from schools on were:

- TPS/APTIS/pensions
- Financial/VAT
- HR
- Financial – general
- Parent contract
- Compliance
- Safeguarding
- Safer recruitment
- Inspection
- Transport/ULEZ
- GDPR
- IT/cyber
- Governance/chair of governors/material changes
- Health and safety
- School closures/mergers and acquisitions
- Unions
- Template complaints procedures

## ISBA bulletins and The Bursar's Review magazine

In addition to our longstanding monthly compliance bulletins, we publish weekly bulletins for members updating schools on the latest regulatory guidance and providing practical advice.

In 2022 and 2023 we published 96 bulletins containing 834 individual articles for schools.

We published 834 bulletin articles for schools in the last two years.

*Thank you for the very useful weekly and monthly ISBA bulletins - I always find them helpful and interesting to read".*

Compliance manager at ISBA member school

We continued to produce our termly members' magazine The Bursar's Review together with specialist supplements on current burning issues. These supplements have proved popular amongst members exploring themes such as finance and risk, HR, equality, diversity and inclusion, and AI. The magazine and supplements can also be accessed online in our reference library and shared more widely amongst school teams.

*"A bit of praise for the latest Bursar's Review. The latest version (summer 2022) is the best one I've seen with a lot of really useful articles and information that is relatable (and shareable in school) to both educate and tweak the conscience!"*

Warren James, chief operating officer  
at Cheadle Hulme School

In the spring of 2023 we published a 116-page sustainability guide for schools which proved extremely popular as schools progress on their net-zero journey. The guide proved so popular we were asked to despatch extra copies to schools.

## ISBA Podcast

In 2022 ISBA began producing weekly podcast updates designed to be easy 'on-the-go' listening for bursars and

ISBA's helpline answered  
**3,948**  
enquiries from different member schools.

We published  
**96**  
bulletins for members.

ISBA's Bursarcast has been downloaded  
**6,326**  
times.

school staff. Available via Spotify, Buzzsprout, Apple and the multimedia section of the ISBA website, Bursarcast's popularity has jumped dramatically – in 2022 there were 413 downloads and in 2023 this had increased to 5,913.

Top episodes have included holiday pay, cyber security, insights from a bursar in a small school (a guest episode), crisis management, and TPS. The ISBA podcast is downloaded in 35 countries across 584 locations.

*"As I end my time at Luckley on Friday I cannot bow out without thanking you wonderful folks at ISBA. You have all been incredibly helpful over the years. I first joined ISBA as a member in 2001 so I have seen it grow from strength to strength over the years but in particular the more recent years with the present team. Not only have the resources and advice been vital it has been a delight to engage with you all in various ways"*

Norman Patterson, retiring bursar  
at Luckley House School

## ISBA reference library and website

The association's reference library offers members more than 2,000 template policies, contracts and guidance documents which are available to download and adapt for individual schools. The library is regularly audited and documents archived to ensure entries in the library are up-to-date and of maximum use to member schools. In addition we are continually developing the library's search function ensuring that schools can access the information they need quickly and easily.

In 2023 there were 79,897 views of documents in the ISBA reference library – an increase of 11,598 on the year before (there were 68,299 document views in 2022).

## ISBA reference library top viewed documents\*

ISBA Model Staff Handbook

**2,231**

Fees in Advance and VAT Guidance

**997**

Busting VAT Myths – a Rolling Document

**1,521**

VAT on Fees Communications  
Guidance for Schools

**1,400**

Fees in Advance Schemes  
(Bursar's Handbook Chapter B)

**1,400**

VAT on School Fees Calculator

**978**

Safer Recruitment Pack

**1,273**

ISBA Scenario Planning Template

**955**

Parent Contract with the School

**1,150**

ISI Handbook – September 2023

**912**

*\*Page views in 2023*

*"Thank you for your recent guidance on VAT on minibuses. My initial estimate is that we should be able to claim back approximately £25k VAT which was previously lost to the school. This figure may increase, once we have fully analysed the proportion of zero-rated vs exempt travel undertaken by our fleet. Thank you for producing such a practical and valuable note".*

Bursar at ISBA member school

*"I would like to say that I think ISBA is incredibly great value and worth every penny. We would spend a lot more on legal and consultant fees without the level of support you provide. So thank you very much for all your good work and support".*

Mike Leeson, bursar and  
strategic business leader at Rokeby School

# Expanding ISBA services

## ISBA inspections app

In September 2023 ISBA launched its new inspections app for schools and, within the first three months, more than 800 member schools had signed up to use the service.

The app has been carefully designed to provide ISBA members with a way of tracking and storing every compliance document required by the Independent Schools Inspectorate (ISI) during the inspection of the school. Using the app, schools can keep all their compliance and inspection documents in one place, with a diary management system that keeps these documents in date and offers a 60-day alert to members of the school staff. In 2024 we intend to develop the capability of the app further using the e-Vault store to accommodate additional forms of school documentation.



## ISBA Business Directory

Following the launch of the ISBA online Business Directory in 2021, we have made further developments to the site including the addition of a separate section for ISBA conference sponsors and exhibitors, together with a new category specifically for charities. The search facility has also been refined in order to make it easier for ISBA members to find out more about the services and products available to them. The directory now contains more than 180 companies and enables schools to search for specialist suppliers across the UK and internationally quickly and easily. Since its launch, revenue from the directory has increased by more than 300 percent.

The Business Directory is frequently visited by bursars and senior management professionals in ISBA member schools. It is available to member schools on the members' area of the website and is also open to all on the public side of the website.



The directory offers suppliers to the sector the chance to demonstrate the commitment they have to quality service for independent schools and to highlight any special offers or discounts they may have for ISBA member schools. New suppliers are added regularly.

*"Over the past few years, we have found the ISBA Business Directory very useful for our work within the independent sector. It provides a centralised information point, with filters and easy access to contacts which enhances our business visibility to decision makers".*

Nathaniel Leney, business development specialist,  
Blakedown Sport and Play



## ISBA Recruitment

ISBA Recruitment offers all ISBA members a cost-effective, comprehensive, and professional recruitment solution for appointing new bursars, directors of finance and directors of operations, whether for an interim or permanent role in the UK or internationally.

The ISBA recruitment team has in-depth knowledge of the bursar role, a unique insight into independent schools' needs and an unrivalled understanding of exactly what it takes to deliver a high quality appointee via a successful and testing recruitment process for schools.

ISBA Recruitment complements the other recruitment support services we offer to the support staff in schools including:

- the 'So, you want to be a Bursar?' course for those who want to come into the sector;
- the Newly Appointed Bursars training courses to equip professionals from other walks of life with the knowledge to successfully work in a school; and
- our new mentoring service for those who wish to have a personal adviser to support them in their role.

In 2023 ISBA Recruitment placed 12 permanent bursars in schools and 37 interim bursars which included appraisers, reviewers of the bursary, and other projects.

## New mentor service

By the end of 2023 ISBA's new mentoring team had 10 confirmed mentors who have undergone interviews and completed the relevant training, ready to support bursars in their schools across the country. There were a further eight provisional mentors currently waiting to complete interview and training. In 2023 the ISBA team had a total of 14 requests from schools for mentors. This is a service to members which we are planning to grow in the future as we train greater numbers of experienced mentors and we anticipate many more requests for such support.

## ISBA's Data Navigator tool

We were delighted to be able to launch our Data Navigator tool for schools with Barnett Waddingham at our annual conference in May 2023. The tool provides schools with access to a modern interactive dashboard where they can define their own benchmark group in real time, and, what's more, the data will then become available for the benefit of the whole sector. Over time, this data set will become a valuable sector resource documenting the changes year-on-year.

*"We used the ISBA recruitment team to assist us with the recruitment of our new director of finance and operations recently and were delighted with the support we received from Lucy and her team. They showed a real interest in us as a school and did an excellent job navigating the long list application process to give us a high quality short list to interview. We are delighted to have appointed an excellent candidate to this pivotal position in our school. ISBA provided a value for money service and are well placed to understand the needs of member schools".*

Alison Knights at Ipswich School

As the economy worsens for schools and parents, the pressure is on to track costs, trends, and progress against future plans. This tool gives schools the ability to do each of those functions and to place the result in a local or national context. We are constantly developing Data Navigator and it can be tailored in particular areas so suggestions for improvements, modifications or extra facilities are regularly encouraged from members. One bursar said the following about the tool:

*"I am impressed by all the information that I can access – I think the Data Navigator will be very helpful for planning purposes".*

## Meeting members' needs

We are delighted that our membership now stands at more than 1,260 schools.

*"As a stand-alone school of under 400 pupils I think ISBA membership offers excellent value for money. We have been taking advantage of all the free webinars, and I don't think I would be able to do the role without the ISBA resource available. It's all too easy to take things for granted, so I wanted to say thank you to you and the team for all you do for us weary bursars".*

Bursar at ISBA member school

# Moving forward

Since 1932 we have existed to benefit our members, providing the optimal level and type of services to ensure each school can deliver the very best possible education for its pupils. We do this by reinvesting all our income into support, advice, guidance, and services for members, while striving to minimise the cost of membership each year.

It seems inevitable that the next few years will present ongoing and changing challenges for independent schools. We anticipate more members will look to us for increasingly tailored advice and support. ISBA has built an excellent reputation as a trusted adviser to the sector and will continue to invest in services, advice and training programmes that are agile and focused on members' needs. Whether schools need specialist advice, access to local regional networks, or have specific questions for their particular type or scale of school, the association is committed to maintaining the agility to tailor its services accordingly.

We all know that the UK will hold a general election within the next 12 months. Regardless of whether this delivers a change in government, with potentially the first Labour administration since 2010, the political and economic environment in 2024 and beyond will be uncertain and changeable. Together with our colleagues and partners at the ISC and its member associations, we will continue to act as a voice for the independent schools sector. ISBA aims to ensure that any changes in the legislative treatment of independent schools recognise the character, impact, and societal benefits of the sector.

In anticipation of the potential challenges and changes ahead, ISBA's training and professional development, advice and guidance services and networks will provide members with opportunities to broaden their skills and knowledge and gain insights at both strategic and operational levels. We expect the next year to see the growing impact and return from our recruitment service as we support more schools to find the right candidates for their permanent or interim bursar positions, and the nascent bursar mentoring programme expands and flourishes. The potential in connecting bursars with an experienced mentor to offer constructive advice, feedback and counsel is significant.

While the road ahead may be bumpy, we remain committed to our core mission and to delivering what the association has always done best. We will serve our members and help

them to run effective and efficient schools that provide a high quality education to many thousands of pupils each year. We will continue to provide relevant, timely and accurate advice and guidance. We will organise and deliver professional development opportunities for a range of leadership and support staff. We will develop effective services and platforms that help members do their jobs and run their schools as well as possible. As we navigate the next few years, we cannot predict the exact route we will need to take, but we can prepare by being agile, focused, and intentional about our mission. This impact report shows how we have delivered in recent years – and the association, our board, and our team are all committed to continuing this work through 2024 and beyond.

*"As a new bursar coming from a completely different sector, I have been very impressed with the support offered through ISBA. I was very grateful for John's guidance when I was going through the recruitment process and, in my early months, the regional network and resources available on the website have been invaluable – I'd advise anyone with questions to search through the site, it is a treasure trove of information! Next stop was the conference in Manchester, which was a fantastic opportunity to network with fellow bursars, meet the wide range of suppliers at the exhibition and listen to some very informative talks. The atmosphere was very welcoming which is great for someone new to the sector, I will definitely be going back next year".*

Steven Platts, bursar at Glendower Preparatory School



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