

# THE BURSAR'S REVIEW

Summer 2025

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## THE IMPORTANCE OF 'RIGHT SIZING' YOUR SCHOOL

- WORKFORCE PLANNING, HOW TO MARKET YOUR NURSERY AND THE PROS AND CONS OF EXPANDING ABROAD
- WARNING SIGNS OF FINANCIAL STRESS AND RE-THINKING CHARITABLE STATUS
- THE ART OF THE BURSAR: UNDERSTANDING YOUR EVOLVING ROLE



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# Welcome to the Summer issue

...from ISBA's chief executive, David Woodgate.

Congratulations on navigating a year of significant change for the sector. We are all keenly aware that business circumstances have changed fundamentally for schools, and that many of you are reconsidering your operating model as you face into the future. The term 'right sizing' applies to all facets of running a school as a business and this issue of Bursar's Review will provide you with guidance, tips and ideas to consider as you refine your strategic plans and forecasts. Our dedicated section (identified by pages with the coloured edges) on this theme includes important articles that will support you in positioning your school for long-term success, from advice on marketing to international expansion, and from charitable status to workforce planning. We also have an article from FRP on the warning signs of financial stress in a business: we know that a number of schools are nervous about the future, so on page 40 we set out some financial 'red flags' which will help you and your governors assess your risk.

Amongst all the change, some things are constant – including the requirement for good governance and inspection readiness. Helpfully, we have advice from AGBIS on excellence in governance (page 18), on page 12 the team at Farrer & Co set out the expectations of governors in the inspection process, and on page 70 we have an article about auditing your Single Central Record.

It will come as no great surprise to readers that the role of the bursar in independent schools is undergoing a profound evolution. Once perceived primarily as a guardian of budgets and buildings, today's bursar is a key strategic leader – navigating complexity, shaping organisational resilience and operating at the heart of school leadership. On page 22, read the findings of the sector-wide research carried out by RSAcademics with ISBA, identifying that the bursar role has outgrown many of the assumptions that once defined it and deserves greater visibility at the strategic level, and more thoughtful support.

There's plenty more for you to absorb across the breadth of a bursar's responsibilities and, as schools quieten down during the summer, I hope that you will be able to read this issue from cover to cover. Although at first glance it may seem that there are red flags waving at every turn, please be assured that we are here to provide timely advice, training and support to members across all of these concerns and more – you are not alone.

If you need our assistance please get in touch with the team at: [advice@theisba.org.uk](mailto:advice@theisba.org.uk) or by phone: **01256 330369**. We're here to help and we look forward to speaking with you.



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Chief executive

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# SUMMER 2025



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# TOP TIPS

Out of all the articles in this issue of the Bursar's Review, we have flagged up some of the most critical topics for you to think about:

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- Clearly define your risk appetite

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- Governors must scrutinise and assess the quality of leadership and management

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- Quality assurance is fundamental to maintaining effective governance

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- Renewable energy providers can now match energy generation against demand on a half-hourly basis

## 78 Testing for radon in independent schools

- Every school must demonstrate they have considered radon in their risk assessments
- Plan your radon testing for the autumn or winter term, not during the summer

COVER STORY



Right sizing your school. The business circumstances have changed fundamentally for schools and the specialist articles within this issue of Bursar's Review (identified by the pages with coloured edges starting on page 26) will expand on the areas that schools need to consider as they move to find their new size, market position and (maybe) selling points.



## SPECIAL SECTION ON RIGHT SIZING YOUR SCHOOL

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Follow a *structured and systematic approach* to risk

Categorise risks based on their *impact and likelihood*

Clearly define *your risk appetite*

# Thriving in turbulent times: a guide to navigating risks in independent schools (part 1)

*Sarah Pearson*, head of enterprise risk management at Ecclesiastical Insurance, discusses how a volatile risk landscape impacts schools and the importance of strategic risk management.

**The world is changing quickly and independent schools in the UK are facing increased pressures. From the past pandemic, ongoing wars to political unrest and climate change, the challenges are mounting up.**

These global issues filter down, creating a volatile, uncertain and complex environment for schools.

## How global issues impact schools

The pandemic led to school closures, disrupting education and increasing

the need for remote learning infrastructure. Political unrest can influence international pupil enrolment and funding. Climate change can result in extreme weather events, affecting school buildings and raising maintenance costs. These broader risks directly impact the day-to-day operations and financial stability of independent schools.

## Top 12 risks for schools (2024)

According to the Ecclesiastical Independent Schools Risk Barometer 2024, (<https://www.ecclesiastical.com/insights/education-sector-risks/risk-barometer-2024/>) the top 12 risks for independent schools are:

1. cost of maintaining school buildings;
2. managing mental health and wellbeing of pupils;
3. recruitment and retention of teachers;
4. cost of living crisis;
5. managing mental health and wellbeing of staff;
6. school inspections;
7. parents' ability to pay school fees (especially with the addition of VAT);
8. safeguarding;
9. cyberbullying;
10. damage to school buildings by fire, flood and storm;
11. financial pressures; and
12. health and safety. ➡







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### Interconnected risks

These risks are often interconnected. For instance, the cost-of-living crisis can strain parents' finances, making it hard to pay school fees and thus reducing school revenue. This financial pressure can lead to budget cuts affecting teacher recruitment and retention, delaying building maintenance, and increasing health and safety risks.

### Financial concern and optimism

Two-thirds (61 percent) of independent school leaders say they are more concerned about finances than ever before. Additionally, 58 percent expect more schools to close in the coming year.

However, the 2024 Independent Schools Risk Barometer also provides cause for optimism. Schools feel better equipped to deal with some of the challenges they face, especially around pupil mental health issues and safeguarding.

### The power of strong risk management

In today's changing risk landscape, strong risk management is vital for independent schools. While insurance can cover some risks such as property damage, liability and vehicle-related incidents, other risks require proactive management.

**Insurable risks** are typically accidental, measurable and financially significant, providing financial protection and stability through insurance.

**Non-insurable risks** are more subjective, uncontrollable or difficult to quantify. Examples include economic fluctuations, regulatory changes and reputational risks. These risks cannot be covered by insurance and require alternative strategies like risk avoidance and reduction.

Many schools have risk management policies and frameworks, but the key is to make them actionable. Effective risk management supports decision-making, ensures good governance and helps schools achieve their objectives. It is important to follow a structured and systematic approach.

### Strategic risk management steps



A typical strategic risk management process involves several key steps:

**1. Identify risks:** determine the key risks affecting your school. These could range from financial pressures due to fluctuating enrolment numbers, safety concerns related to extreme weather events or cybersecurity threats.

**2. Analyse risks:** understand the root causes and consequences. For example, a cyberattack could result from outdated software or weak security measures. Consequences include compromised data security, reputational damage and financial costs for recovery and legal fees.

**3. Prioritise risks:** assess the likelihood and impact of each risk. Use tools like risk matrices to categorise risks based on their impact and likelihood. Focus on those that pose the greatest threat to your school's operations and objectives.

**4. Mitigate risks:** use the '4 Ts' to manage risks effectively:

- **Treat:** implement controls to reduce risk. This could include enhancing cybersecurity measures, improving building maintenance, or providing mental health support for pupils and staff.
- **Transfer:** share risk through insurance or third-party arrangements.

For example, insurance can cover areas like property, liability, cyber threats and business interruptions. Additionally, third party arrangements such as service contracts and leasing can also help transfer risks.

- **Tolerate:** accept risks that fall within your school's risk appetite. Some risks, like minor fluctuations in enrolment, might be manageable without significant intervention.
- **Terminate:** stop activities that pose high risks. If a particular extracurricular activity is deemed too risky, it might be best to discontinue it.

**5. Monitor risks:** regularly review and report on risks to ensure the focus remains on key issues and those outside of the school's risk appetite. The governing board should provide appropriate oversight, ensuring that risks are regularly reviewed, actions are taken and they are effectively monitored.

To further strengthen your risk management process, defining your risk appetite is increasingly important. It helps independent schools determine the level of risk they can accept to achieve their goals. It guides decision-making, balances risks and opportunities and ensures actions align with the schools' values and objectives.





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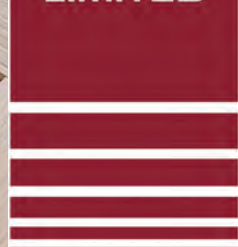
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## Risk appetite

The Institute of Risk Management (IRM) defines risk appetite as *'the amount and type of risk that an organisation is willing to take in order to meet their strategic objectives'*.

Level	Description
1. Averse	Avoids any risk beyond the essential
2. Minimal	Prefers safety but accepts minimal risk for gains
3. Cautious	Balances risk and reward conservatively
4. Open	Willing to take moderate risks to achieve objectives
5. Hungry	Actively seeks out risk opportunities for growth

## Steps to defining risk appetite

Defining risk appetite requires thoughtful consideration, time and engagement with others. To support this, we have developed some key steps to follow:

- Example only:

- 1. Identify risk appetite levels:** agree on levels (e.g., 1-5) and describe each briefly.
- 2. Identify key risk appetite themes:** cover key areas of activity within your school like finances, operations, people, and safety.
- 3. Recognise current risk appetite levels:** assess where the school currently stands.
- 4. Acknowledge desired risk appetite levels:** define desired levels aligned with strategic goals.
- 5. Compile descriptors for each risk theme:** use plain language to describe expectations e.g. finance, health and safety (see examples below).

- 6. Compare current and desired levels:** identify gaps and areas for improvement and implement actions to move to desired state.
- 7. Obtain board approval:** seek endorsement from the board of trustees.
- 8. Communicate and implement:** share the risk appetite with staff and stakeholders. Integrate it into planning and decision-making.
- 9. Monitor and report deviations:** regularly assess risk exposure and report deviations.
- 10. Annual review and adaptation:** Review and adjust annually or after significant changes.

## Bringing risk appetite to life

For instance, if a school has a minimal approach to people risks, such as mental health and wellbeing, it might adopt proven and less risky options to manage stress, such as regular mindfulness sessions and access to professional counselling. These interventions help manage stress and anxiety effectively. A school with a minimal risk appetite would take extra steps to lower high-risk situations involving people. This means adding more controls to manage and reduce these risks effectively.



Author

**Sarah Pearson**


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

A school with a more open risk appetite might try new and creative ideas. This could include testing new mental health apps or starting programmes such as art therapy. These methods might be riskier but could offer special benefits and insights. Additionally, the school might be more comfortable with fewer controls, meaning they wouldn't invest additional time and resources and would accept higher people risks if they fit within the school's overall risk appetite.

## Conclusion

Independent schools in the UK face a complex and challenging risk landscape. By understanding and managing these risks effectively, schools can navigate uncertainties and remain resilient. Strong risk management, aligned with a clear risk appetite, supports schools in achieving their educational objectives while fostering a stable, well-governed environment. Embracing proactive strategies and innovative approaches can position the school to thrive, even in the most turbulent times.

Ecclesiastical has developed a FREE risk maturity assessment tool to support organisations in strengthening their strategic risk management arrangement. (<https://tinyurl.com/riskmaturityassessment>) 

Finance risk descriptors	
1. Averse	The school only invests in government bonds and keeps most funds in secure savings accounts. No more than five percent in other investments. Prioritises capital preservation.
2. Minimal	The school invests a small portion of its funds in low-risk mutual funds while keeping the majority in secure savings. Up to 10 percent in low-risk investments. Willing to take minimal risks for slightly higher returns.
3. Cautious	The school diversifies its investments across low to moderate risk assets, such as a mix of bonds and blue-chip stocks. Up to 30 percent in moderate risk assets. Balance risk and return for steady growth.
4. Open	The school invests in a broader range of assets, including some higher risks stocks and real estate, to seek better returns. Up to 50 percent in diverse, higher risk assets. Accepts significant risks for better returns.
5. Hungry	The school invests in high-risk, high reward ventures like start-ups or emerging markets to maximise potential returns. Up to 70 percent in high-risk ventures. Aggressively pursues high returns, accepting potential losses.

Health and safety risk descriptors	
1. Averse	The school adopts a zero tolerance for risks. Strict adherence to health and safety regulations, with rigorous inspections and monitoring in place.
2. Minimal	The school maintains strong health and safety measures, making minor adjustments for efficiency. Limited risk tolerance, ensuring thorough training and regular compliance checks.
3. Cautious	The school maintains strong health and safety measures, but allows for measured flexibility. Moderate risk tolerance, focusing on proactive improvements and continuous staff development.
4. Open	The school adopts innovative health and safety strategies, including partnerships with external organisations. Higher risk tolerance, aiming for dynamic and adaptable approaches.
5. Hungry	The school embraces high-risk health and safety initiatives, such as experimental programmes and cutting-edge technologies. High-risk tolerance, focusing on bold measures to maximise safety and wellbeing.





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Governors must understand *how risk is identified and managed* in the school

Governors must *scrutinise and assess* the quality of leadership and management

Governors should remain on top of any *legislative or internal developments*

# Inspections – being ready for what's expected from governors during an inspection

In this article, the team from Farrer & Co set out the governors' duties before, during and after a school inspection.

**Inspections involve nearly all stakeholders at a school.** In the independent sector, inspectors consider whether a school is compliant with the Independent School Standards Regulations (ISSR). These are the requirements that school proprietors agreed to meet when applying to register the school.

During an inspection the natural focus is on the senior leadership team who

will be on the ground throughout and who implement the day-to-day running of the school. However, it is the school's governors who are ultimately responsible for the management and governance of the school, as well as the school's compliance with law and regulations, including in relation to safeguarding. As a result, they will naturally play a key part in the inspection process, but what exactly does that look like?

This article looks at the role governors are expected to take and the sorts of questions they may be asked during an inspection to reflect their awareness of what is happening at the school throughout the year in order to ensure compliance. For the purposes of this article, we have focused on the ISI inspection process, noting that non-association independent schools will be inspected against Ofsted but held accountable to the same standard, as set out in the ISSR.

An obvious place to start is Part 8 ISSR – the quality of leadership and management in schools. This provides that the standard *'is met if the proprietor ensures that persons with leadership and management responsibilities at the school (a) demonstrate good skill and knowledge appropriate to their role so that the independent school standards are met consistently, (b) fulfil their responsibilities effectively so that the independent school standards are met consistently, (c) actively promote the wellbeing of pupils.'* ➡

▼ When governors come in for visits, the purpose of that visit should be documented







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Most proprietors of independent schools are charities or companies limited by a guarantee, and, in most cases, governors will be members of the proprietor body i.e. a trustee or statutory director. As a result, it is ultimately the governors who must ensure that Part 8 is satisfied and, as many will know, where a school fails another ISSR standard, for example in respect of safeguarding or welfare, health and safety, the school will also be found non-compliant in respect of Part 8. Therefore a lot of gravity is understandably given to the leadership and management in schools and the governors must be in a position to illustrate the quality of it in their own schools. It is not necessarily a question as to whether the governors are aware of all operational practices within the school, rather it requires governors being aware of what is being done in practice in order to ensure compliance. They will be required to understand how risk is identified and managed in the school.

### ISI inspection framework

The ISI inspection framework, which sets out ISI's principles and methods of inspection, provides that the focus of an onsite inspection is to see the school *'in its day-to-day operation and to hear the view of pupils.'* As part of that, inspectors will speak to as many people as possible, including proprietor/s, governors and the chair of governors.

Whilst governors have less day-to-day presence at their school, they are expected to be embedded and endorse the culture of the school, and to provide pupil-centric responses to inspectors. ISI consider different 'levels' of school culture, with different levels being capable of being experienced at the same time within a school.

Governors will be key to providing a positive outward face of the school community, providing positive examples of pupil engagement, understanding how pupils may contribute to the school community themselves and how the school embraces its culture through events and contributions to the school community. In our experience, there has been a renewed focus on culture within schools, perhaps due in part to #MeToo, Everyone's Invited and the Black Lives Matter movement and the changing landscape which followed the pandemic. Therefore culture is now key and governors need to be prepared to illustrate the strength of the school's culture and how that flows through leadership and management, as well ensuring that the school meets all the required standards.

Governors will also be expected to be able to illustrate their awareness of how certain aspects of the curriculum are meeting the needs of pupils in different year groups, as well as factors which influence pupil wellbeing. This will include awareness of the RSE curriculum, and more recently, a renewed focus on the School Attendance (Pupil Registration) Regulations 2024 and how the school ensures its compliance with those regulations. Again, what is key is being able to show awareness of school initiatives and any recent changes which have been brought in through policies and procedures to reflect legislative or regulatory changes, and the practices in place in order to confirm staff compliance.

### Preparation

From a practical perspective, when preparing for an inspection or just as an exercise to ensure good practice, governors should consider the ISSR

and how they are kept up-to-date in respect of key developments at their school – whether it be in relation to any legislative developments, the curriculum or any safeguarding or health and safety concerns. They should also consider their knowledge of key school procedures, such as safer recruitment, HSE and the parental complaints procedure, as well as any recent concerns raised under those procedures. For example, in respect of parental complaints, they should be aware of how many concerns have been raised under the procedure in the past year or so and what role the governing board has played in those concerns (if any), as well as any changes implemented by the school as part of any outcomes.

In addition to those policies, governors should be clear on their duties under the ISSR and how those duties connect with those policies and any recent or ongoing investigations within the school (e.g. a live parental complaint or safeguarding review).

They may also be asked about the training they have undertaken in respect of their role and how this has informed their understanding of the safeguarding policies and procedures in place. They will be expected to have good knowledge of the mechanics of procedures and should be able to give recent examples of their operation. For example, they should assure themselves that staff understand their responsibility for flagging low-level concerns and be able to illustrate how they are confident of this (e.g. through training records, regular safeguarding quizzes and training).

When governors come in for visits, is the purpose of that visit documented and, if so, does it suitably capture what the ISSR expects of governors? They should have an awareness of ►

Governors should be able to illustrate their awareness of how certain aspects of the curriculum are meeting the needs of pupils in different year groups, as well as factors which influence pupil wellbeing.





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the most recent safeguarding review and how it informed leadership and governors in respect of the provisions in place and any lessons learnt.

On a positive note, ISI's 2023/2024 annual report, in its 'working well' analysis, states *'Inspectors found examples of effective self-evaluation by leaders and managers, with robust and ongoing analysis of their work and with governors providing appropriate support and challenge.'* In terms of what could improve, the annual report states *'In some schools, more could be done to ensure rigorous identification and management of risk. Inspectors found examples where staff could have greater awareness of the school's risk management processes. Inspectors found that it is sometimes not clear enough who holds responsibility for reviewing and updating relevant policies.'*

### Leadership

Governors are expected to scrutinise and assess the quality of leadership and management in order to ensure compliance with Part 8, which could range from assessing the standard of teaching and support offered to pupils, the implementation of aspects of the curriculum such as RSE and the correct implementation of policies in practice (which naturally has relevance to the other standards inspected against). ISI's 2023/2024 annual report provides that *'Those with governance responsibility, including trustees and proprietors, must assure themselves that leadership skills are in place and that leaders fulfil their responsibilities effectively so that standards are met.'* Inspections are naturally a snapshot in time and they should not be the only form of quality assurance for schools for governors to ensure that leadership and management are doing a sufficient job in respect of the day-to-day, implementation of policies and handling of safeguarding or staff concerns.

Governors should assure themselves throughout the academic year that the school is operating as it should. ISI has produced optional self-evaluation guidance in order to provide a format to help leaders at all levels assess the impact of their leadership. Whilst



this guidance is optional, the ISI Handbook does provide that *'current self-evaluation and school development planning information'* is likely to be required during the onsite inspection. Self-evaluation should be seen as an embedded part of school culture and should provide assurance to governors, as well as identifying areas of concern which may be remedied prior to any substantial issues arising and prior to an inspection. Inspectors will also consider leaders' decision-making and approach to issues when determining their knowledge and skill. Having sufficient records of key decision-making and ongoing decision-making processes will naturally provide evidence of thought processes and, if such evaluation has been appropriately considered prior to inspection, should instil confidence in the leadership team and the governors.

### Appropriate action

Another role for governors is to ensure that they are alerted to any concerns during the inspection, for example in respect of any concerns about the wellbeing of any staff member and any concerns in respect of anything identified during the inspection which may have consequences for the school, in order to ensure that these issues are raised and dealt with in an efficient and appropriate manner. Normally one or two governors will attend the final feedback meeting (essentially on behalf of the proprietor) and provisional judgments may be shared with the governors in respect of the aftermath of an inspection. All ISI inspection reports provide guidance for governors and leaders relating to recommended steps following an inspection. It will fall to the governors to issue appropriate

▲ During an inspection, governors may be asked about the training they have undertaken in respect of their role and how this has informed their understanding of the safeguarding policies and procedures in place

action is taken in respect of those recommendations and to scrutinise any new policy put into practice.

### Conclusion

In conclusion, governors should ensure that they have sufficient oversight and knowledge of the school throughout the academic year and be able to demonstrate the steps they have taken to scrutinise leadership and management to ensure compliance with the ISSR. Governors should remain on top of any legislative or internal developments, be prepared to respond to inspectors and illustrate policies and practices in place, as well as the importance of school culture and how it is embraced in order to show they have sufficiently discharged their duties to their school and its pupils. ◀●



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# The biggest cybersecurity risk in your organisation is your *people*

Cybercriminals target human behaviour and exploit technological gaps. Even the best IT security system can be undone by a single click on a phishing email or an unchecked request for sensitive data. But this is not the root cause of the problem.

**Often seen as soft targets, schools are fertile hunting grounds for cybercriminals. Human behaviours are at the heart of vulnerability – one careless click on a fake email or a rushed reply can spell disaster.**

In 2022, a busy Bedfordshire secondary school was brought to its knees when attackers stole pupil and staff data and then held it for ransom. No sophisticated hack – just an exploit of everyday human behaviour. This caused weeks of curriculum disruption, a bruised reputation and ongoing risks for those whose data was leaked.

Sadly, this school's story isn't unique. Schools are a goldmine for sensitive information, yet tight budgets and packed schedules can make it hard to stay ahead of cyber threats. It's a reality that cybercriminals count on.

Most schools still rely on once-a-year training that's outdated, dull, and worse, easy to forget. The trouble is, knowing *what* to do isn't the same as *doing* it. In fact, 66 percent of employees admit they still take risks online – even when they do know better.

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- **Proven results:** see measurable impact you can share with governors, parents, and your board — not just completion stats.

## A stronger security culture starts here

Cybersecurity isn't just about firewalls and backups – it's about *people*. By investing in practical, behaviour-focused solutions like Republic, schools can build a culture where safe actions become second nature. This protects not just data, but also trust, wellbeing, and the confidence of staff, pupils and parents alike. ◀●

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*Quality assurance* is fundamental to maintaining effective governance

Periodic assessments of governors' skills ensures the board has the necessary expertise to *support the school effectively*

Embedding a culture of continuous improvement in governance helps to ensure the *long-term success of the school*

# Ensuring excellence in governance: the role of quality assurance in independent schools

Independent school governance is becoming increasingly complex with growing expectations around compliance, risk management and strategic vision. To navigate this complexity effectively, quality assurance and agile governance must go hand in hand.

▲ Providing feedback can offer a well-rounded view of governance performance

**As governance professionals, clerks play a crucial role in ensuring that independent school governing bodies operate effectively, strategically and with accountability.**

Clerks are not just administrators – they are the architects of governance quality, guiding boards through best practice, compliance and strategic decision-making. Alex Mitchell, head of consultancy at AGBIS, emphasises that quality assurance is fundamental to maintaining effective governance. AGBIS Reviews of Governance, led by Alex, provide governing bodies with expert-led evaluations to help schools

identify strengths, address gaps and ensure compliance with best practice. In this article, Virginia (Ginny) Parkes, director of learning and professional

development for AGBIS, explores why there is such a need for quality assurance amongst governing bodies noting that ISBA's own David Woodgate recently ►

Agile governance ensures that governing bodies can quickly adapt to new challenges, regulatory changes and emerging risks while maintaining a strategic focus.



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spoke of a review of governance he once commissioned as chair of governors and said: “AGBIS’s review of governance moved our school governing body forward by five years, in just five weeks”.

### The need for quality assurance and agility in governance

Regular review processes ensure that governance structures remain flexible and responsive, allowing schools to adapt quickly to evolving challenges while maintaining accountability and strategic focus. In this evolving landscape, adopting an agile approach to governance is essential. Agile governance ensures that governing bodies can quickly adapt to new challenges, regulatory changes and emerging risks while maintaining a strategic focus. Just as schools implement rigorous quality assurance in teaching and learning, governance must also be subject to structured review and evaluation to maintain high standards. Without effective monitoring, even the most well-intentioned governing bodies risk inefficiencies, blind spots or missed opportunities for improvement.

### Internal audits and self-assessment

A key component of quality assurance is internal scrutiny. Regular self-assessment and internal audits provide governing bodies with valuable insights into their strengths and areas for development. Some key steps include:

- **Board effectiveness reviews:** by using structured self-assessment tools, governing bodies can measure their performance against best-practice frameworks and identify areas for development.
- **Skills audits:** conducting periodic assessments of governors’ skills ensures the board has the necessary expertise to support the school effectively.
- **Policy and compliance checks:** reviewing governance policies, committee structures and decision-making processes, including delegation of authority protocols, helps to ensure that governance is efficient and compliant with regulatory expectations.

- **360 degree feedback:** engaging governors, senior leaders and key stakeholders in providing feedback can offer a well-rounded view of governance performance.

### The value of external reviews

While internal quality assurance is essential, external perspectives bring an added layer of objectivity and expertise. Independent reviews of governance offer an impartial evaluation of how a governing body functions, providing constructive feedback and recommendations.

One such service is AGBIS’s review of governance service led by Alex Mitchell, head of consultancy. The review service is specifically designed to support independent schools to strengthen their governance. These reviews cover a breadth of areas including but not limited to assessing:

- board composition;
- board effectiveness;
- governing body leadership;
- decision-making processes;
- regulatory compliance; and
- strategic alignment.

By engaging external experts, schools gain valuable insights that can lead to significant improvements in governance effectiveness.

### Why governors should embrace quality assurance

Embedding a culture of continuous improvement in governance is not about compliance alone – it is about ensuring the long-term success of the school. High-quality governance leads to better decision-making, stronger financial oversight, and a governance

team that is well-prepared to navigate challenges and opportunities.

Governors who actively participate in audits and external reviews demonstrate a commitment to excellence and accountability. By doing so, they strengthen the trust of parents, staff and wider stakeholders, reinforcing the school’s reputation and sustainability.

### What next?

From coordinating internal audits and board effectiveness reviews to facilitating external evaluations, the governance professional, as ‘guide and guardian’ of the board, acts as the linchpin in maintaining high governance standards. Their expertise in governance processes ensures that schools remain compliant, strategic, and forward-thinking.

If your governing body has not yet undertaken a formal review, now is the time to consider both internal audits and external evaluations. The AGBIS review of governance offers a structured approach to identifying strengths and areas for growth, helping schools to refine their governance practice and ensure they are meeting the highest standards.

For more details on the AGBIS review of governance, visit [www.agbis.org.uk](http://www.agbis.org.uk) or email [consultancy@agbis.org.uk](mailto:consultancy@agbis.org.uk)

To explore this topic further, tune into our recently recorded podcast (available via the AGBIS website) on the clerk’s role in ensuring effective quality assurance within a governing body, where Richard Harman, CEO of AGBIS and Alex Mitchell discuss how quality assurance helps drive success. ◀●



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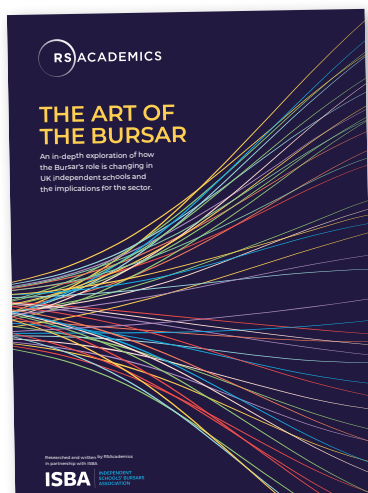
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# The Art of the Bursar: understanding the evolving role

The role of the bursar in independent schools is undergoing a profound evolution. Once perceived primarily as a guardian of budgets and buildings, today's bursar is a key strategic leader – navigating complexity, shaping organisational resilience and operating at the heart of school leadership.



**At RS Academics, we've seen this shift first-hand through our work with schools across the country.**

But we wanted to go further: to understand what defines success in the modern bursar role and what conditions enable that success to thrive. In partnership with ISBA, we launched *The Art of the Bursar* – a sector-wide research project combining survey responses from more than 300 bursars, heads and governors, with in-depth interviews and focus groups.

This report forms part of our ongoing thought leadership series, 'The Art of ...', and offers the most comprehensive study to date of the bursar's evolving remit. Our findings paint a picture of a role that is broader, more demanding and more strategically influential than ever before. Far from being confined to financial management, bursars today oversee a wide range of functions from HR and compliance to estates, IT and risk management, often with limited infrastructure or support. And yet, amidst this operational pressure, we found a profession that is highly committed, deeply purposeful and increasingly central to a school's long-term success.

## A role redefined

Bursars have always been pivotal to the operational wellbeing of schools,

but the scale and diversity of their responsibilities today is striking. It's not uncommon for a bursar to handle financial planning, legal risk, staff wellbeing, capital projects and strategic partnerships. The diversity is not only across tasks but also across contexts. The role looks very different in a large urban day school compared to a small rural prep school. In smaller schools especially, the bursar may be the only senior non-academic leader, which magnifies both their influence and their isolation. Regardless of the setting, one theme emerged clearly: expectations are rising, complexity is increasing and the need for strategic thinking has never been more urgent. The knowledge base required has expanded too. Legal and regulatory awareness has become a key requirement, alongside HR acumen and IT competence. Strategic thinking and emotional resilience were identified as the most critical skills and personal qualities – not just to cope with the demands of the role, but to lead effectively in increasingly unpredictable environments.

## More than a job title

A recurring theme in our research is the mismatch between the title 'bursar' and the reality of the role. In many schools, the title belies a strategic, wide-ranging leadership post more akin to a chief operating officer. This semantic gap can undermine perceptions of the role's scope and significance both internally and externally. As one participant put it, *'it's hard to lead as a peer on*

*the senior team when people still think your job is just the accounts.'*

Yet, despite the pressures, bursars consistently described their work as deeply rewarding. The opportunity to make a visible impact, solve complex problems and contribute to the educational mission of the school brings a powerful sense of purpose. The variety of the role was also cited as a core source of satisfaction – albeit one that comes with its challenges.

## Navigating school culture

One of the more unusual findings from the report is that 90 percent of bursars had no prior experience of working in schools before taking up the role. This makes the transition into education particularly distinctive. Schools are complex, values-driven environments that operate through consensus, traditions and relationships – very different from the command structures or commercial urgency of many bursars' previous careers. For many, the learning curve is steep. Success depends not only on technical competence, but on emotional intelligence, adaptability and a willingness to immerse oneself in school life. The most effective bursars are not just administrators; they are cultural integrators, bridging professional divides, building trusted relationships and modelling a collaborative, mission-led approach to leadership.

This cultural fluency is not incidental. It is central to the bursar's effectiveness. In our model of bursarship, we've ➡

▲ Download *The Art of the Bursar* from ISBA's reference library



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termed this 'ways of working' – a dimension that encompasses the relational, political and judgement-based skills that enable bursars to lead through influence rather than authority. It's about reading the room, knowing when to advocate and when to listen and stitching together the operational and the strategic in ways that resonate with the school's ethos.

### Under pressure

Alongside the expansion of the role has come an escalation in pressure. From VAT to safeguarding regulations, from pension reform to affordability concerns, today's bursar is expected to absorb and respond to a relentless stream of external demands. Compliance in particular was singled out as a growing burden, often outpacing the capacity of schools, especially smaller ones, to manage it effectively. Unsurprisingly, financial uncertainty was a dominant theme. The need to generate non-fee income, manage rising costs and maintain competitive positioning is now a key part of the strategic agenda. For bursars, this often means leading change, fostering innovation and helping colleagues to understand the financial realities facing schools.

Yet many bursars find themselves caught in a paradox: they are expected to lead strategically, but are overwhelmed by the demands of daily operations. The report describes this tension as 'doing the important as well as the urgent' – and it is perhaps the defining challenge of bursarship today.

### Strategic influence in action

Despite these constraints, many bursars are playing an increasingly strategic role in their schools. They are driving digital transformation, leading capital campaigns, shaping governance reform and supporting heads and governors in long-term planning. Their leadership is not just about infrastructure or finance, it's about helping the school navigate change with clarity, coherence and confidence. This strategic capacity, however, does not emerge in a vacuum. It depends on structure, trust and alignment. Schools that deliberately create space for their bursars to think, lead and innovate are better placed to

harness the full potential of the role. Conversely, even the most capable bursar will struggle in a context of unclear expectations, limited support or fragmented governance. That's why one of the most powerful findings in the report is the importance of what we've called the 'bursar-head-chair triangle.' Where this leadership trio is well aligned, the bursar's impact is significantly magnified. Where it is strained or unclear, the role can become unsustainable.

### A framework for effectiveness

To help schools better understand and support the role, we developed a five-part model of bursarship. This model provides a practical framework for identifying, developing, and supporting the capabilities needed to succeed.

**Knowledge:** foundational expertise in finance, compliance, HR and legal matters. It's not about knowing everything, but about knowing what matters and where to find the right support.

**Skills:** communication, conflict management, systems thinking and strategic planning. These are the tools that bursars use to operate effectively in complex, dynamic settings.

**Personal qualities:** resilience, humility, integrity and clarity of thought. The role is often high stakes, isolating and emotionally demanding.

**Working environment:** conditions that enable success: governance clarity, team capacity, aligned leadership and shared priorities.

**Ways of working:** the art within the science: relational fluency, contextual judgement and the ability to lead without formal authority.

These five dimensions are not abstract ideals; they are grounded in the real experience of bursars and represent the composite profile of the most effective professionals in the sector today.

### The conditions for success

Beyond individual capability, our research emphasised the importance of organisational design. Are bursars operating within roles that are simply too broad to be sustainable, especially in smaller schools? Is there a case for rethinking role structures, redistributing

responsibilities and investing in support staff to build internal resilience?

Appointment and induction also matter. Given that most bursars come from outside the sector, the recruitment process must assess not just technical competence but cultural adaptability and emotional intelligence. Similarly, induction must go beyond policies and procedures to include meaningful engagement with the values and rhythms of school life.

Professional development, too, is essential. Strategic thinking, HR leadership and compliance are all areas where bursars report a need for more support and structured learning. Coaching, mentoring and peer networks, such as those provided by ISBA, can play a vital role in sustaining capability and wellbeing.

### Final thoughts

*The Art of the Bursar* is not just a report – it's a call to action. A recognition that the role has outgrown many of the assumptions that once defined it. That it deserves greater visibility, more thoughtful support and a clearer path to sustainability. Independent schools face a future of increased complexity, heightened scrutiny and growing financial pressure. In this landscape, the bursar is not a back-office figure. They are a leader of strategic consequence integral to the success, cohesion and future-proofing of the school.

We invite school leaders, governors, and sector stakeholders to read the full report and reflect on how they can better enable this vital role. Because when the bursar is well supported, the whole school benefits. You can explore the full findings and download *The Art of the Bursar* from ISBA's reference library at <https://isba-referencelibrary.org.uk/ReferenceLibrary/ViewPolicy?policyID=15371> ◀



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*Tracking of management data* is of paramount importance

*Ask critical questions* about your school's future position within an increasingly stratified market

Schools must adapt with *clarity and confidence*

# Right sizing a school – what does it mean?

The term 'right sizing' really applies to all facets of running a school as a business. The business circumstances have changed fundamentally for schools and the specialist articles that follow within this section of Bursar's Review (identified by the pages with coloured edges) will expand on the areas touched on here.

**Looking back, the academic year 2024-25 was unique.** It is therefore a difficult year from which to draw any conclusions as VAT was applied for only two terms of the three, fees in advance were payable before 29 July 2024 and many schools cut their fee levels in order to absorb some of the impact of VAT.

In macro-economic terms, in 2024 there was a budget which increased public spending but did not increase the tax take and, therefore, that will have to be corrected, most probably in early 2026. GDP growth is weak and will continue to be weak for several reasons – both national and international. None of the foregoing will increase parental confidence and that will have an effect on the decisions they make on behalf of their children.

Every school will have a strategic plan, which will have to consider local trading factors, the geographic and market position of the school, and the constraints and advantages that each of those factors dictate.

Your school is currently of a particular 'type' – in terms of price point, admissions criteria, size, shape, charitable status (or not), with overseas branches (or not), cost base and other factors. Each of these aspects should be subject to your scrutiny in the context of the local competition in order to determine your target future type. The questions governors should be asking themselves and the senior leaders will range widely. The following are examples to get your discussions started – and our hope is that the

articles in this supplement will provoke further considerations:

- Can we succeed as this type of school for the next five years?
- What arrangements can stand up to the competition from other schools?
- What other school type should we consider? Or do we stay as we are?
- What have been the key factors of success so far?
- What is changing those factors; how do we do respond?
- To what extent is the falling birth rate constraining the number of prospective pupils?
- Is the state sector providing refreshed competition?
- Of the recent school closures, which can we use as indicators of specific issues or concerns that may apply to us? ➡

▼ As schools move to find their new size, market position and (maybe) selling points, the familiar risks of safeguarding, cyber, teacher recruiting and retention, fee debt and the mental and physical wellbeing of staff each need to be carefully monitored and managed







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The answers to each of those questions depend on a detailed knowledge of the school, its competition and the demands of the current and future parent bodies. The information that will assist in the analysis of the questions and the formation of the answers will be largely available within the school, but some will have to come from external surveys of current and future parents.

### Pupil numbers

Tracking of management data within the school is therefore of paramount importance. As an example, those schools that are (and have been) tracking the number of parental enquiries, visits and the number of enrolments that result will be able to see the effect the recent changes have had on their market. From that basis and considering the changes in the birth rate within the area in which pupils have been (and will be) recruited allows an informed estimate of pupil numbers to be achieved. However, those numbers should be produced with the caveat that the full effects of the application of VAT to school fees is yet to be felt.

The recently published ISC Census revealed a two percent drop in pupil numbers overall and there were record decreases, of around five percent in Reception, Year 3, and Year 7 enrolments. This is despite small year-on-year increases in fees with about 70 percent of schools reducing their underlying fee to reduce the impact of VAT.

This early involuntary move to change the financial model of schools is a key element of 'right sizing' and will need to be continued.

### Affordable business model

Much has been written about financial scenario planning and, for the next two or three years, until the independent school market stabilises in its new shape, this skill will be pivotal in planning the success of the school. Within the scenario planning there will be assumptions on which the calculations will be based and those assumptions need to be as carefully considered as the numbers themselves. The risks should be

Risks should be quantified so prudent conclusions can be drawn on the future size of the school and the breadth of curriculum subjects that can be offered within an affordable business model.

quantified as far as possible and prudent conclusions drawn on the future size of the school and, within it, the class sizes and the breadth of curriculum subjects that can be offered within an affordable business model.

### Strategic adaptability

Finance is not the only risk area. Sitting squarely on the agenda of each governing board will be a detailed study of the risk register for the school. While the school is moving to find its new size, market position and (maybe) selling points, the familiar risks of safeguarding, cyber, teacher recruiting and retention, fee debt and the mental and physical wellbeing of staff each need to be carefully monitored and managed.

There is a governance risk in dealing with the near term, the next two years, and losing sight of the following five. While schools are finding the right size and shape to be, the dominance of 'for profit' groups of schools will continue to grow and parental demand will drive towards a stratified market. There will be premium schools where price is not a significant factor, there will be those who alter to allow a greater number of parents to purchase independent education and those who rely on large numbers of moderate level fees to serve the market in which they find themselves.

As independent schools navigate a changing financial and demographic landscape, the process of 'right sizing' is not merely about cutting costs or adjusting structures – it's about ensuring long-term sustainability and strategic adaptability. The challenges posed by VAT, economic uncertainty and shifting parental affordability underscore the necessity of data-driven decision-making and rigorous financial scenario planning.

Governance remains at the heart of this evolution, with boards and senior leaders needing to ask critical questions about their school's future position within an increasingly stratified market. Whether schools move towards premium offerings, broaden access or consolidate their model, success will depend on a clear strategic vision backed by informed risk management.

### Innovation

Financial considerations are only one aspect of the transformation and, as mentioned above, schools must remain vigilant in areas such as safeguarding, cybersecurity, staff retention and curriculum planning to maintain their reputation and deliver value to families. While the sector faces disruption, independent schools have always demonstrated resilience – adapting business models, refining their approaches and finding innovative solutions to challenges.

'Right sizing' is not just about survival – it is about positioning the school for long-term success. With shifting market dynamics, evolving financial models and new parental expectations, schools must adapt with clarity and confidence. Those who embrace strategic planning, risk management and innovation will not only weather the storm but emerge stronger in the years ahead. ◀●



Author

**John Murphie**

Former COO, ISBA



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### Where to get started

The Greener Schools Index (GSI) provides the perfect starting point to assess your current level of climate action, identify next steps and benchmark your progress.

Developed by Zenergi and the UK Schools Sustainability Network (UKSSN) Ops Group, the GSI is a free self-assessment tool covering 16 areas of school operations – from energy and water to catering and school trips and everything in between. By taking part you'll receive an individual report summarising your responses and providing actionable insights.

### What have we learned so far?

The first report of the findings was published in April and offered some powerful insights:

- 62 percent of schools had appointed a sustainability lead; but
- only 24 percent had developed a climate action plan; while
- a further 53 percent were still working towards it.

So if you haven't yet developed your climate action plan, you're not alone! And by taking part in the GSI, you can use your individual insights to develop your plan or strengthen an existing one. It's also a useful tool to motivate and engage your governors, trustees and leadership team in your sustainability efforts.

### What are some of the most useful learnings?

With the GSI, schools can track their progress and identify new opportunities – many of which may already align with existing priorities like reducing energy bills or water costs. For example, we discovered that:

- 74 percent of schools are tracking their energy usage;
- only 33 percent have an energy reduction goal or target;
- only 15 percent were confident they had reasonable temperature set points and out-of-hour controls in place
- 47 percent of schools track water usage;
- only 7 percent have a water reduction goal or target; and
- only 26 percent have implemented water-saving technologies.

What this tells us is the GSI shows progress *and* possibility:

- You might discover that you're already doing more than you thought, and that's worth celebrating.
- You might uncover gaps which gives you something tangible to work on.



Nick Drake, director of net zero at Zenergi

### Ready to take action?

So, whether you're just starting out on your sustainability journey or already on your way, completing the GSI will make the process easier and help you go further.

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The business case for restructuring must be **carefully documented**

**Consultation meetings** should generally not take place during school holiday periods

**Trade union activity** in independent schools is increasing

# Workforce planning – initial considerations for schools and the impact of future reform

This article by *Rachel Parkin* and *Gemma Hill* of HCR Law considers some of the options available to schools and key factors to consider when reviewing workforce strategy.

**The independent schools' sector is experiencing significant change. The implementation of VAT on school fees, the removal of business rates relief and increase in national insurance contributions have added pressure to school finances and many schools are closely reviewing costs.**

In addition to the financial pressures currently facing the sector, legislative change is imminent, including the introduction of unfair dismissal protection from day one of employment, restrictions around the use of 'dismissal and re-engagement' and changes to the rights of zero hours workers.

On average, schools spend more than 70 percent of their budget on their workforce and, in this context, a strategic approach is required for schools to survive and thrive during these challenging times. A variety of

workforce change strategies should be considered including flexible working, contractual arrangements, pay and benefits, as well as restructuring and redundancies.

**Initial factors schools should be considering**

The first step in any workforce planning process will be to consider the business needs of the school and the options available for meeting that need.

Often, workforce changes are driven by financial considerations. However, change may also be proposed to improve efficiency or to improve the quality of the service and education offered.

Consideration could be given to engaging an external consultant to review the school structure and whether there are any areas that could be streamlined without affecting provision.

Once the business need has been determined, it is then necessary to consider the options and the strategy to be put in place.

A redundancy or restructuring process might not always be the only option and it is important to explore possible alternatives. Such considerations will support the school's rationale for change and will be crucial in showing that a fair process has been followed should dismissals ultimately be necessary.

**Alternative cost saving measures to consider**

**Suspending or restricting recruitment** – this is often the first step schools take and may involve a freeze on recruitment or non-essential appointments, as well as the non-renewal of fixed term contracts. ➤





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**Reviewing pay structures** – reviewing pay structures, particularly the criteria and requirement for additional pay and allowances, is advisable to ensure that they remain fair and competitive but also cost effective.

**Unpaid leave and staff sabbaticals** – if schools are dealing with a temporary reduction in work, it may be beneficial to talk to staff about a period of unpaid leave or a sabbatical. This may be attractive to some employees depending on their personal circumstances.

**Voluntary redundancies** – schools should consider offering staff the opportunity to apply for voluntary redundancy to seek to avoid/reduce the need for compulsory redundancies.

**Changes to current terms and conditions** – including:

- reducing hours;
- reducing salary;

- changing staff benefits; and/or
- pay freezes.

These changes can be contentious and may amount to a contractual change so will require staff engagement and, ideally, where the change is contractual, agreement.

### How flexible working can support a staffing strategy

The importance of in-person teaching and the inflexible nature of timetables can make it difficult for schools to accommodate flexible working. Schools are often cautious about encouraging flexible working applications, with concerns being raised about the potential impact this can have on continuity of teaching and parent perception.

However, given the current challenges, many schools have

experienced a fall in pupil numbers and a reduction in the work to be undertaken. If there are staff within the school that have been considering reducing their hours, encouraging them to make an application via the school's flexible working policy and/or carefully reviewing any requests received, can be a helpful way to meet this business need.

A communication could be sent to staff during the early stages of consultation to seek applications for flexible working, in the context of the school's business need to reduce costs.

Flexible working also offers benefits such as helping to retain experienced staff and improving work-life balance. This can help future-proof your workforce and build morale, which can be important where a school is experiencing a period of change. ➡

▼ With the increase in the protective award and the removal of the qualifying period for unfair dismissal, the stakes will be higher if consultation processes are flawed

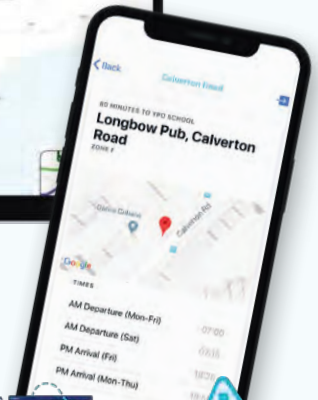
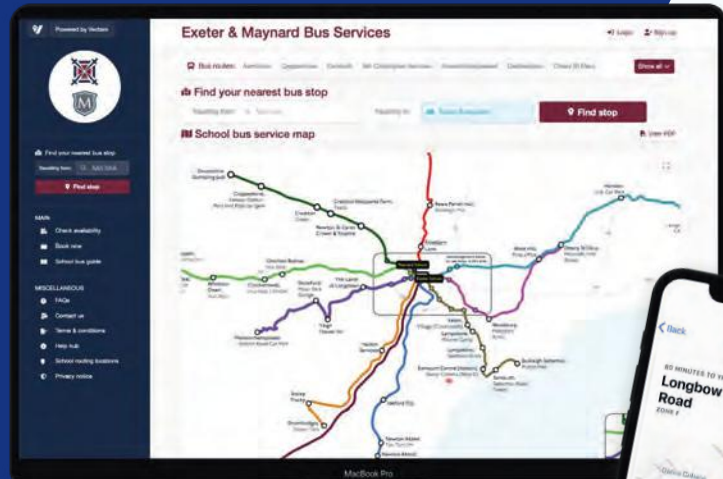




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Reviewing existing contractual arrangements to ensure flexibility in the school's staffing structure (e.g. use of consultants, those on fixed term contracts etc) is also recommended. Zero hours contracts currently provide flexibility where the work is irregular or less predictable e.g. exam invigilators or sports coaches. However, changes to zero hours arrangements are imminent under the Employment Rights Bill (see further below) which may limit their flexibility going forward.

Some schools are considering changing the employment status of their visiting music teachers (VMTs) for efficiency reasons. This is not, however, straightforward and any proposal to change the status of a school's existing VMTs, or to engage new VMTs on a different basis compared to existing VMTs, will carry risk from a legal and tax perspective, particularly where the change in status is driven primarily by the imposition of VAT. We recommend schools seek legal and tax advice before proceeding.

### When alternative cost saving options have been considered but further changes are required

Whether the school is launching a consultation in relation to a restructure, changes to staff terms and conditions or a redundancy process, the school's business case and rationale will be key.

The business case should be carefully documented, approved by governors and legal advice should be sought. The document should set out the proposals, the alternatives considered, the process to be followed and will be important in the event that a school's decisions are challenged.

It will also be necessary to consider the applicable timescales. Consultations of this nature take time and should not be rushed. There may be statutory timescales to consider depending on the numbers affected. Generally, consultation meetings should not take place during school holiday periods and so can extend over a number of terms. Flexibility should be built into the timetable for implementation to allow sufficient time should unexpected issues arise.

Consideration should also be given to the staff who may be affected by the proposals, including those who may be absent for any reason, the communication plans and the senior members of staff that will be managing the consultation process. Careful consideration of the project team and these initial steps can help ensure that the process runs smoothly. The goodwill of staff is vital to achieving a desired outcome and this can easily be lost if a fair process is not followed.

### Do the proposals amount to a redundancy or a restructure?

Once the school's business need and strategy have been determined, consideration should be given as to whether the proposal amounts to a redundancy or restructuring exercise. The determining factor is whether the proposed changes fall within the statutory definition of redundancy under the Employment Rights Act 1996.

In summary, the statutory definition covers:

- business closures (closure of the school);
- workplace closures (e.g. closure of one school in a school group); or
- diminished requirements for employees to do work of a particular kind.

A dismissal of an employee will only be by reason of redundancy where the dismissal is *wholly or mainly* attributable to a reduction in the school's requirements for employees to carry out work of a particular kind. If a school's proposals relate to changes in job duties or other terms, this may not amount to a redundancy situation and instead any resulting dismissals would most likely be for 'some other substantial reason'.

### Proposed future changes in this area

The Employment Rights Bill (the Bill) was published on 10 October 2024 and incorporates significant changes to employment law. The most relevant proposals are:

**Unfair dismissal:** all employees will be protected from unfair dismissal from day one of employment, removing the current two-year qualifying period. Whilst

The goodwill of staff is vital to achieving a desired outcome and this can easily be lost if a fair process is not followed.

it will be possible for employers to dismiss within an 'initial period of employment' by following a light-touch process for reasons such as misconduct, it is not anticipated that this initial period will apply to redundancy dismissals. As such, once this change comes into force, a fair redundancy process will need to be followed for all employees, regardless of length of service.

**Dismissal and re-engagement:** the Bill restricts the circumstances in which employers can use dismissal and re-engagement to implement contractual changes. Currently, dismissal and re-engagement is a legitimate way for a school to implement changes if agreement cannot be reached following consultation. The Bill, as currently drafted, will only allow dismissal and re-engagement where the change is essential to a school's viability as a going concern.

**Trade unions:** the Bill will strengthen trade union rights and remove 'unnecessary restrictions' on trade union activity. The changes proposed include the right for unions to access workplaces, a simpler process for obtaining statutory union recognition and a requirement to provide workers with a written statement of their right to join a trade union.

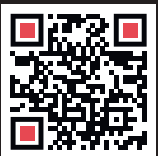
**Collective redundancy:** the Bill will increase the penalty imposed on employers for failure to comply with their obligations to collectively consult (the protective award) from 90 to 180 days per affected employee. ➡



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**Flexible working:** the Bill requires any refusal of a flexible working request to be reasonable. This is a change to the current position that only requires an employer to deal with flexible working requests in a 'reasonable manner'.

### How these changes will impact staffing strategies

Schools will need to consider the timing of any consultations regarding staffing changes in the light of the upcoming reforms. Where restructures are required, the restrictions around the use of dismissal and re-engagement will make implementing contractual changes, which are not agreed with staff, more difficult. Further, with the increase in the protective award and the removal of the qualifying period for unfair dismissal, the stakes will be higher if consultation processes are flawed.

Schools should also consider the internal arrangements for staff

engagement, communication and negotiation. We are seeing an increase in trade union activity in independent schools, often in the context of workforce planning consultations. The proposals to strengthen trade union rights might further encourage the unions to be more engaged in these issues but where staff are satisfied with the current internal arrangements for communication, they are less likely to support applications for recognition and/or ballots for strike action.

It is currently expected that most of the reforms will be implemented in 2026 and 2027 however those relating to trade union rights could come into force as early as autumn this year.

**Therefore, if your school is considering taking steps in respect of staffing structures, you may wish to progress these processes sooner rather than later with legal advice being sought at an early stage. Schools who take**

**early, informed action will be best placed to navigate the challenges which the sector is currently facing whilst at the same time remaining competitive and attractive to staff and parents.** ◀●



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If schools are dealing with a temporary reduction in work, it may be beneficial to talk to staff about a period of unpaid leave or a sabbatical







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High levels of short-term debt are often *a mask for underlying losses*

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If your school is making losses, *its assets are at risk*

# On alert: key signs of distress in independent schools

It's a pivotal time for the independent school sector as we approach the end of the first academic year in which school fees have been subject to VAT.



▲ Starting with the financial 'red flags', the most obvious is an increasing level of short-term debt, including a reliance on increasing overdraft limits

**The change of government and its move to apply VAT to school fees from January 2025 was an inflection point that was widely anticipated to have a significant impact.** But we don't think people foresaw quite how big that impact would be; this is the most transformational policy change for the sector in living memory.

Leadership teams will by now have been able to assess the immediate impact of this change, with good visibility over pupil numbers for the year ahead. As such, if the work has not already been done, it is now essential for schools to be looking ahead to next year and the following years, assessing their health and planning any strategies that may be required to support income streams and manage their cost base to stay viable.

## Potential issues that schools must be alert to

### Financial fundamentals

Starting with the financial 'red flags', the most obvious is an increasing level of short-term debt, including a reliance on increasing overdraft limits.

A healthy school should be cash flow positive, receiving income at the beginning of term ahead of making payments for staff, overheads and HMRC. Short-term debt is often a mask for underlying losses that, at an early stage, can be used as a sticking plaster to aid cashflow but do not deal with the underlying problems.

Another warning sign should be the use of advance fees to fund losses. Schools may have offered parents the opportunity to pay fees in advance,

perhaps even offering a discount for doing so. It's an attractive option for all parties – at one point helping shield parents against VAT-linked fee increases and also giving schools access to capital without borrowing.

However, these funds should not be depleted. It could lead to a situation where schools are left with running costs and no corresponding cash to pay for them.

In a similar manner, it's often a warning sign if schools are seeking time to pay arrangements with HMRC. This is something we've recently seen, with some schools struggling to make their first VAT quarter.

More schools are seeking to plug gaps like these by selling off assets including buildings and ►





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# Warning signs aren't just to be found in management information – they can also be seen in a lack of governance and preparedness, and in a culture that chooses to maintain the status quo rather than address challenges head on.

sports fields to developers, cashing in endowments or seeking donations. But, as we've discussed in previous articles (see: <https://isba-referencelibrary.org.uk/BursarsReview/ViewIssueFlipbook?issueID=1076>), this is clearly a one-off short-term solution that must be used effectively to bridge to a viable business plan rather than fund ongoing losses.

## Operational warning signs

The attitudes and actions of school senior leadership teams, or lack of, should also be something to scrutinise.

In the face of a rapidly evolving operating environment, schools need to be open to change. But it might be that they are not as flexible or adaptive as they should be, and are 'stuck' in ways that, unless addressed, could exacerbate or perpetuate unsustainable situations.

In these circumstances, it might be valuable to bring in an expert third-party partner to run an analysis of a school's position and forecast its future performance and financial and operational viability. The best partners will also be able to develop a contingency plan as part of this forecasting process. These plans are something that every school should have in place and will set out potential steps to take to try and return a school to a sound operational footing should certain negative situations arise – from minor pressures all the way to worst-case scenarios.

They might not ever be needed, but just having one can be an incredibly powerful way of sharpening leaders' minds as to the variety of risks their

school could face and preparing them for the types of difficult decisions they might need to make.

It also empowers schools to take decisive, proactive action at the earliest signs of trouble – something that is one of the most important factors in any turnaround or rescue scenario.

Indeed, it's a warning sign in and of itself if leadership teams are aware of a financial and operational issue but choose to look the other way, instead hoping the problem will disappear on its own.

## Moving fast, and having expert advice

On the subject of decisions, school leaders and boards should be structured so that they have close oversight of operational and financial health and are able to respond quickly to early signs of cracks. In 'normal times', quarterly meetings of the full board and sub-committees could be appropriate, but in operating conditions like these more frequent engagement is advisable. A lack of such oversight, or an informal process, is a red flag.

It's also vital that leaders are aligned, armed with the necessary skills to navigate their current operating environment – and it is another potential warning sign if these aren't in place.

After all, this is not the 'business as usual' environment that boards are used to and schools may not have the required skill set in place to deal with such challenging times.

Addressing skills gaps might again require bringing in outside advice

or even making new permanent appointments to leadership teams or boards to add people with experience in navigating the specific challenges schools face.

## Guardrails – duties, data and decision-making

When thinking about operational and financial risks and actions they might take to address them, school leaders and bursars must always be mindful of the governors' statutory obligations. These should form 'guardrails' – shaping, but also containing, decision-making so that what might start as undesirable financial issues don't end up as breaches of duties.

## Charity law

The first set of such 'guardrails' where a charity is in difficulties concerns duties under charity law.

That sets out several important duties for leaders, perhaps the most pertinent of which is an obligation to protect and preserve the school's charitable assets. Fundamentally, that means not making operational losses; if your school is making losses, its assets are at risk.

Schools must not continue incurring operational losses indefinitely without a credible and deliverable plan to return them to financial viability – whether that involves a turnaround, charitable merger, or in the event that a longer term viable solution is not achievable, seeking to preserve or maximise the value of assets through an orderly closure.

Another important duty under charity law is to act with reasonable skill and care; making reasonable decisions based on good information. Financial and operational decisions must be based on good management information and this will particularly be the case when assessing future pupil numbers, revenues and funding requirements.

## Insolvency and corporate law

If a school is facing insolvency, or the likelihood of insolvency, the duties of the governors to creditors under insolvency law supersede their duties to their pupils as the charity's beneficiaries. ➡



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Often, we see an understandable drive from school leaders to continue operating the school and delivering education, no matter the circumstances. In extreme situations if governors act ‘recklessly’ or worsen creditors’ overall financial position after a point where insolvency is inevitable, it could lead to governors becoming personally liable for the school’s debts.

At the same time, the Companies Act 2006 requires every director to avoid a situation where they have a conflict of interest with the company they have responsibility for. Such conflicts can arise in the simple cases where governors have children at the school. These governors should be vigilant for this and, after taking legal advice, be ready to absent themselves from any discussions and votes that could result in the closure of the school following a loss of viability.

#### Next steps

Warning signs aren’t just to be found in management information – they can also be seen in a lack of governance

and preparedness, and in a culture that chooses to maintain the status quo rather than address challenges head on.

School bursars are perfectly positioned to review all potential issues, whether financial or operational, and to take prompt action in addressing vulnerabilities, in whatever form they take. While this might not necessarily mean schools avoid any sort of consequence from challenging conditions, it nearly always means the outcome is better than it would have been if leadership teams and governors had been slow to react, or responded without the necessary support and expertise.

As just one example, the bursar of a leading independent prep school that had falling pupil numbers and financial deficits was concerned that their board simply didn’t grasp the gravity of the situation. They wished to highlight the issues the school faced and identify potential solutions.

In developing a simple paper that outlined the challenges and reminded

the board of its statutory duties and ‘guardrails’ the problem could be identified and the parameters established in which a solution could be explored.

Eventually, the school successfully merged with another, providing stability for its pupils. Without the bursar’s intervention and proactivity, it’s highly unlikely such a positive outcome could have been secured. ◀●



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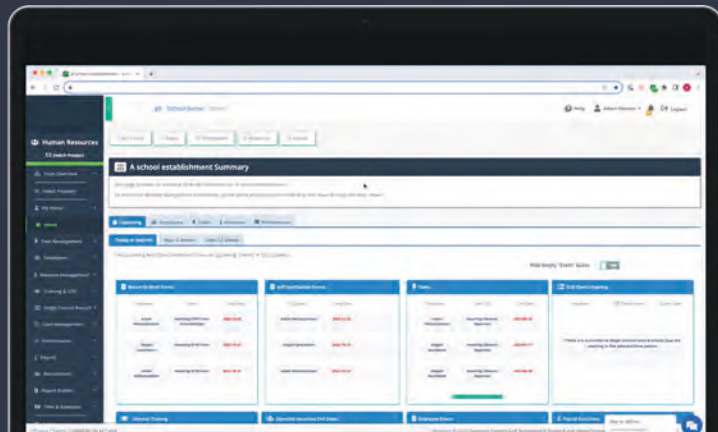
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Operating as a *purpose-driven charity* is advantageous in many cases

Parameters around charitable status may be overcome for some using the *'hive-down' model*

Charitable schools may attract *tax-efficient giving*, while non-charitable schools benefit from greater flexibility in *paying board members*

# Purpose over profit? Rethinking charitable status for independent schools

As the independent school sector navigates recent changes, a question is coming up with increased frequency: is charitable status a successful operating model for independent schools or does a for-profit model offer more?

**Analysing this question is not confined to considering structure and taxation – it's about purpose, sustainability and perhaps even the future of education.**

There is also a question as to whether this is even the right question to ask. There is no magic wand allowing an organisation straightforwardly to shift out of charitable status, but potential routes out are contemplated here.

This article draws on the session I delivered with Anthony Turner, a partner at Farrer & Co specialising in corporate law, at ISBA's annual conference in May on a similar topic.

## **The rise of purpose in a profit-driven world**

Much of the corporate world has embraced the language of 'purpose' as an important feature of a successful business, alongside profit. Businesses now routinely talk of values, mission

and social impact. But while this shift is admirable, we must not lose sight of a key distinction: for-profit organisations, by definition, exist to generate profit. That, of course, is not inherently negative – indeed, charities can and do learn from the efficiency and innovation of the corporate sector but it is fundamentally different from the charitable model. Charities must be established for a charitable purpose that delivers public benefit. There is no mention of profit within that legal test, only purpose.

## **The long history of schools – both charitable and for-profit**

Most charitable schools are established to advance education, sometimes alongside a further charitable purpose such as promoting religion or relieving poverty.

Education has long been recognised as an object of charity under English and Welsh law. The preamble to

the Statute of Elizabeth I in 1601 in describing legitimate objects of charity include reference to *'the maintenance of schools of learning, free schools and scholars in universities'* and *'the education and preferment of orphans'*.

While endowed or charitable schools have co-existed alongside schools run on a for-profit basis for hundreds of years, in general, charitable schools have been larger, better funded and the more prestigious institutions, with the proprietorial school model generally favoured for smaller institutions that subsist with a more hand-to-mouth existence. This fact does not mean charitable schools are more advantageous today, but for centuries charity has housed the country's largest and most well-known independent schools. It might be said that charity has a clear evidence-based track record for stewarding schools over centuries that is yet to be seen among commercial groups.

The burden of charitable status under the weight of Charity Commission expectations and the requirements of charity law grows no lighter.





## Today's challenges

The relationship between charity law and independent schools has often been less than straightforward.

While less is heard today of public benefit (although the requirements on independent charitable schools in this regard have not gone away), schools today are required to accept the restrictions of charitable status but are no longer provided with the same benefits, now that the 80 percent mandatory relief from local authority rates has been removed.

Given that for many charitable schools the rating relief was more valuable than the relief from direct taxes, this is a significant and costly shift. While VAT, strictly speaking, is not linked to status, the imposition of VAT on school fees has obviously added significant weight to the increased costs burden on schools.

The advantages of being a charity may, to many charitable schools, now seem to have retreated, while the burden of charitable status under the weight of Charity Commission expectations and the requirements of

charity law grows no lighter. It may be this that is contributing to questions being raised around status and the next section of this article draws out the key differences between the two models.

## Understanding the two models: charitable and for-profit

### Charitable schools

Charities are established for public benefit. Most charitable schools exist to advance education with any surplus being reinvested into the school. They are subject to oversight by the Charity Commission and must comply with strict rules around governance, including limitations on paying governors and non-primary purpose trading.

### Advantages:

- purpose-driven;
- asset-locked for charitable purposes with all surplus re-invested;
- eligible for tax-efficient donations and legacies and exempt from almost all direct taxes; and
- greater trust from parents and other stakeholders.

### Challenges:

- regulatory oversight from the Charity Commission;
- restrictions on trading, although these are often capable of being overcome through use of a trading subsidiary;
- in most cases, it is not possible to pay governors/charity trustees for acting in that capacity and the Charity Commission continues to emphasise the importance of voluntarism; and
- no access to equity funding as there is no share capital.

### For-profit schools

For-profit schools are businesses. They can be privately owned and run as a single school or be part of larger education groups. These schools are not bound by charitable restrictions and can operate with greater flexibility.

### Advantages:

- more flexible governance structures;
- ability to pay board members and to have a corporate-style board with executive and non-executive directors;



A standalone nursery would be an obvious example of an activity which may benefit from the greater flexibility on offer within a for-profit company





- access to secure injections of equity funding through the issue of new share capital; and
- fewer regulatory constraints as the Charity Commission has no jurisdiction over for-profit schools, although there is regulation from the Department for Education and the requirement to comply with the Independent School Standards.

#### Challenges:

- profit motive may raise concerns among parents and staff and may lead to greater challenge to fee increases, if profits are being paid to the owner;
- less access to philanthropic funding as no tax efficient giving to a for-profit and less appealing for parents wishing to make a gift; and
- potential for short-term decision-making driven by a desire to see financial returns within a particular time period.

#### Focus on funding and financial sustainability

One of the key differences between the two models lies in funding. Both charitable and for-profit schools can access commercial borrowing in most cases, but only for-profits can raise equity by issuing shares. On the other hand, charitable schools are more likely to receive major gifts and legacies, thanks to the tax advantages for donors.

This raises an important question: does a commercial approach enhance or undermine long-term viability? The answer may depend on the school's size, goals and community expectations.

#### Is the issue about status or something else?

It can be easy to blame charitable status for that unwieldy committee structure or the long delay there seems to be in taking decisions when a matter needs to go to the governors.

In many cases, there may be a kernel of truth that those same obstacles are much less likely to arise within a for-profit structure. However, those issues are not, strictly speaking, to do with status but instead may indicate the need to revisit governance and assess if any streamlining of existing

systems is feasible. While the challenge of extensive governance changes should never be underestimated, governing bodies should regularly reflect on their governance practices to consider how they could be improved to strengthen systems of governance, rather than accepting the status quo at face value.

#### Best of both worlds?

A charitable school cannot simply stop being a charity and ask the Charity Commission to remove it from the Register of Charities or restructure by transferring its assets and undertaking to a new for-profit company for no consideration.

The assets of a charity are exclusively and irrevocably dedicated to charitable purposes. This means that the exit out of charitable status for a school is to be sold to a for-profit operator at full market value.

A potential alternative to a sale to a commercial operator is the 'hive down' model, where a charitable school transfers its operations to a subsidiary for-profit entity. Effectively, the school is transferred to be operated by a trading subsidiary that is owned by the charity that originally ran the school. The financing to create this model is complicated as the charity would need to finance the purchase of the school by the trading subsidiary – probably by way of loan from the charity to trading company.

While this model does help to resolve some of the limits charitable status imposes as it would allow unfettered trading and a smaller corporate-style board to operate the school that included paid directors, it also has disadvantages.

It ultimately leaves the school being run by a company that exists to support the charity, rather than the operation of the school being the charity's purpose. Over time, this is likely to lead to a situation where the school drifts further from the charity and the trustees of the charity (whose overriding duty would be to the objects of the charity, rather than the school's success) may start to press for greater returns and funding from the school for use in pursuing the charity's new purpose.

In essence, the school's importance in the structure is relegated to a position where it is there to generate revenue, rather than remaining purpose driven.

Alternatively, and while keeping the school within the charity, it could be explored whether other aspects of the educational activities offered might be hived down into a for-profit entity. A standalone nursery would be an obvious example of an activity which may benefit from the greater flexibility on offer within a for-profit company. Schools will be familiar with running summer schools and letting of facilities within trading companies, and doing the same with a standalone nursery would allow that activity to (potentially) have greater flexibility in including paid executives on the board and carrying out trading activities without restriction.

#### To sum up

The advantages and disadvantages of charitable status versus for-profit status will land differently on different schools. There is no one-size-fits-all solution, and charitable schools questioning their status should assess whether the disadvantages of the status are capable of being overcome or whether a route out of charity for the school warrants closer consideration.

That said, for many charitable schools the advantages of being a purpose-driven organisation that can attract volunteers (including its governors), tax efficient donations and can easily collaborate and even merge with other charitable schools will remain of considerable appeal. ◀●



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Allocate a *dedicated marketing budget* for your nursery

Identify your *target audience*

Start a *competitor audit*

# How to market your nursery

Speaking at this year's ISBA's annual conference, the association's chief executive, David Woodgate, reminded us all that for the sector to survive and thrive, understanding what makes your school brand stand out from the crowd is essential. Relevant and clearly communicated differentiation is one of the cornerstones of commercial success.



▲ Holding an open event for your nursery is a great way to showcase your setting and meet new parents

**This article explores how schools can build and define relevant differentiation having recently introduced or refocused their nursery provision.**

Every school does, of course, have its own perspective, philosophy and ethos which helps to shape the offering. By adding a nursery to the lower end of your school it can help separate it from

your competitors. Maybe it is open all year round and offers your parents the convenient childcare they need? It's the perfect way to create a profit centre and boost numbers into reception and from then on, all the way up your school.

So how can you market your new nursery, or your recently expanded setting, in an effective way? In the increasingly competitive early years sector you need to position your nursery as the trusted and appealing choice for parents in your community and, at the same time, demonstrate why it is different to others they may be considering. ➤

Finding the right nursery is a major decision for parents, often charged with emotion, so understanding their priorities and requirements is key to your marketing activities.



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### Getting the marketing right

#### Set a nursery marketing budget

Allocate a dedicated marketing budget for your nursery. Wrapping it into the overall school marketing has its benefits for selling the all-through journey but nursery parents will have a different mind-set, and you need differentiated marketing that speaks directly to them.

Always bear in mind, the main reasons parents will choose your nursery are:

- it's the right 'fit' for them and their child;
- convenience – close to home/close to work/close to a travel hub/with a good drop-off facility;
- reputation – in all our research we find that parents overwhelmingly choose nurseries and independent schools via word of mouth, through friends and family; and
- the quality of your provision and customer care must be consistently excellent.

#### Establish systems and set KPIs

Establish the processes and procedures you will use to measure the success of marketing your nursery. By this we mean:

- how enquiries translate into places;
- website traffic;
- engagement on social media;
- customer satisfaction; and
- retention rates (not just from nursery to prep but also within the nursery itself).

This will help you determine which channels and marketing strategies are working for you.

### Always start with research

Finding the right nursery is a major decision for parents, often charged with emotion, so understanding their priorities and requirements is key to your marketing activities.

#### The parents: prospective and current

Who is your 'ideal customer'? If you can identify your target audience then you can make sure that your marketing resonates with the people you want to attract by meeting their needs and addressing their concerns and anxieties.

We suggest creating a profile of the type of parents you want to attract, keep it current and updated as your knowledge grows. Include details about where they live, their ages and the ages of their children, their occupations and family situation. You need to know who you are talking to so you can understand how to talk to them.

It's also crucial constantly to update the knowledge you have about your current families, such as their ongoing needs and priorities and what they think about your nursery. This helps you to develop and improve your provision, always ensuring that you are meeting (and hopefully exceeding) their requirements. You can do this easily with online surveys. Keep the surveys simple, ideally no more than five or

six questions, focusing on what they like best about your nursery and what they would like to see developed or improved with plenty of open-ended questions that allow parents to provide detailed feedback in their responses.

By listening to your current families and making continuous improvements you can provide the highest quality in your nursery, meeting the requirements of both children and parents, and thereby enhancing your reputation in the local market.

#### Your competitors

In order to ensure your marketing campaign is successful, you will need knowledge of your local area.

Keep an eye on what other early years providers in your area are doing by starting a competitor audit, researching the key features of your key competitors and keeping this updated.

With so much choice available to parents looking for childcare, it is critical to identify what sets your nursery apart from others in your area to differentiate it. This could be flexible hours, unique teaching/childcare methods, outdoor spaces, specialisms and many other features. Adrian Bowcher from Dean Close, where he runs 10 highly successful nurseries, told us at ISBA's conference that he offers haircuts for children and some nurseries even offer a laundry service. What could be more convenient for dual working, time-pressed parents? These differentiators should all be noted in your competitor audit.

In addition, investigate all aspects of early years provision, including what type of childcare parents prioritise now, what their future requirements might be and how you can fill any gaps. The more sources of data and information you access the better, as you'll need to know birth rates, employment and travel-to-work information, along with changes in your local area such as new housing developments and industrial/business parks, both of which are likely to attract new families who may well be looking for a nursery.

All of this will be invaluable to your databank of knowledge. ➡

▼ Create a clear plan for how your nursery can achieve its goals by effectively reaching its target audience







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## Build a robust marketing strategy

This ongoing research programme will inform your key messages and the outcomes you wish to achieve in your marketing activity. These considerations will form the basis of your marketing strategy.

Create a clear roadmap for how your nursery can achieve its goals by effectively reaching its target audience. Independent schools are at a distinct advantage in this respect and you will probably have dedicated marketing personnel who will be familiar with working with a marketing strategy and marketing planning.

Key aspects of your nursery marketing planning should include:

### A strong online presence via your website

Most parents cite 'word of mouth' as the key factor in considering nursery provision, but many will still initiate their search online so having a regularly updated website and social media presence is essential to boost your visibility to potential new families, while at the same time supporting current families with news and information.

Parents will look at your website and social media posts and form an impression of who you are well before they ever enter your setting, and they may even choose to visit your nursery based simply on your online presence.

On that basis, you'd be amazed by the number of independent school websites we look at that lack basic information. The age range of the pupils, single sex or co-ed, and where they are located are only a few items that are often missing and parents who are short on time will simply lose interest in you, however good your school is.

This is even more crucial for the nursery section. Private, voluntary and independents such as Bright Horizon, Fennies and Busy Bees often have a whole website dedicated to one branch of their nursery whereas independent schools will have a page, or two, as part of a whole school website. This simply isn't enough.

So, make sure the nursery section of your website:

- explains to prospective parents what your nursery offers, for example:
  - o age group catered for; and
  - o hours and weeks available.
- demonstrates why parents should choose your nursery over others; and
- explains how the nursery meets their needs. This should cover any Government funding you offer.

In addition, you can add value by providing helpful content to support parents, such as blogs and newsletters to share parenting tips, educational articles and updates about your nursery. Testimonials from other parents are also important to build trust and spread the word. These features will help to establish and enhance your position as an authoritative player in the local nursery landscape and help your brand differentiation.

### Active and engaging social media accounts

Instagram and Facebook are the most popular platforms for young parents, so run targeted Facebook and Instagram ads aimed at local families in addition to your normal school advertising.

Social media posts, using both photos and short videos, can cover content of what happens in your nursery on a daily basis, profiles of the staff and events happening in the local community that will appeal to parents with young families. Make sure you post regularly to engage with your followers and build a strong online community with lots of chat about what's happening in your nursery setting.

### Offline marketing activities

When it comes to promoting your nursery, offline activities are also an effective way to attract your target audience.

### Printed materials

Yes, this form of media can still be useful! Distribute printed materials such as posters, flyers and brochures in locations where you know that young families (and grandparents who pay the nursery and school fees) may see them. This can range from the notice board in coffee shops and community noticeboards in supermarkets to churches and leisure centres. Ads in

local magazines and newsletters are generally low cost and can still help awareness, depending on where your school is located and if there is a strong local community.

It's also worth noting that the signage outside your nursery should be clear, informative and eye-catching, consistent with your overall school branding while clearly communicating that this is the nursery section of your school.

## Events

Holding an open event for your nursery is a great way to showcase your setting and meet new parents.

This can be a fun and interactive way to engage with both parents and their children, giving them a taste of what your nursery has to offer. We have seen several nurseries offering very successful themed open events which, in effect, become an enjoyable 'day out' for families while performing an effective sales function at the same time. Remember to offer access to your main school during an open event, if you can, as this will show parents that your nursery is the first step on their child's educational journey with you.

## Schedule regular reviews

Lastly, remember to regularly review your marketing strategy to ensure it is still relevant and effective. As your nursery develops, your marketing strategy may require fine-tuning to meet new challenges and opportunities. Regular monitoring and subsequent adjustments will ensure your nursery stays competitive, appealing and continues to attract new interest. ◀●



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# Is international expansion right for your school?

*Colin Bell*, chief executive at COBIS, sets out clear and comprehensive advice for schools who are considering expansion into international markets.

▲ For many, expansion into international markets presents a valuable opportunity to diversify income streams, strengthen a school's brand globally and engage with new communities of pupils and families

**The international education sector is currently undergoing a period of significant and sustained growth, reflecting many social and economic factors including a global shift in how families perceive and prioritise education, an increase in middle-class families and mid-market options, a rise in mobility and pockets of regional economic buoyancy.**

Around the world, there is a growing demand among parents and guardians for educational experiences that go beyond traditional academic learning. Increasingly, families are seeking schools that not only deliver strong academic outcomes but also place an emphasis on holistic development – nurturing

skills such as critical thinking, creativity, emotional intelligence and global citizenship. These qualities have long been defining features of international education, making it an attractive option for a diverse and expanding audience.

At the same time, the landscape of independent education in the UK is evolving. Shifting demographics, challenging financial and policy environments and growing local and international competition is prompting many British independent schools to look overseas. For many, expansion into international markets presents a valuable opportunity to diversify income streams, strengthen a school's brand globally and engage with new communities of pupils and families.

According to the latest research by ISC Research, there are now 14,833 K-12 (kindergarten to 12th grade) international schools around the world, an eight percent growth since January 2020. International schools now serve more than 7.4 million pupils worldwide, due in large part to growing interest from local families. ISC Research also states that the international school market, as of January 2025, generates \$67.3bn in total annual fee income, a 22 percent increase since January 2020, and this shows no signs of slowing down.

With this momentum showing no signs of slowing, international education continues to be one of the most dynamic and promising segments within the global education landscape. ►



# Where does your school stand on the Teachers' Pension Scheme (TPS)?

- As the number of independent schools remaining in the TPS falls below 30 percent of the total, we share our experience.
- Thinking of leaving, currently leaving or already left? What you need to know.
- Our webinars cover the key points for every TPS scenario – and more.

**Since 2019, the TPS and its Scottish equivalent (STPS), has become a significant cost for independent schools and it shows little sign of easing with the next change to contribution rates due in just 22 months.**

If your school is considering the future, has embarked on a consultation to propose changes, or has already implemented changes, the process for each stage needs to be carefully managed to ensure best outcomes over the long term for both the school and its teachers.

Our latest Freedom of Information request found just 676 remain in the TPS – the direction of travel for most seems clear.

## Learning the lessons of school pensions

Less certain can be what schools need to do at whichever milestone they find themselves.

We've broadened our own education from the numerous schools we've guided through this challenge and want to share our experience through our webinar sessions – details to the right of the page.

It may be that your school is currently in the TPS/STPS, or perhaps you have a hybrid model of existing teachers remaining in the scheme and newer recruits in a different arrangement?

You may be working through a consultation but haven't considered the additional replacement benefits carefully enough to ensure that teachers can continue to receive some level of additional death and ill-health benefit.

Another aspect we advise on is what schools still need to do if or when they have left the TPS/STPS. Often, at the end of a demanding consultation, how best to manage the risks to the school and support teachers can be overlooked.

## The importance of effective communication

Whatever your situation, it's critically important that you communicate effectively to help your teachers understand the benefit available to them. This is equally as important both during and after any consultation. We find that even the most generous package can miss the mark without this.

This is particularly important for recruitment in a post-TPS environment. Generally, teachers have not had to pay too much attention to benefits when the TPS is in place. Post-TPS, it couldn't be more different, with potential colleagues scrutinising closely what they stand to gain.

## The value of expert guidance

Teachers are not expected to be pension experts and member documents and websites don't help them to learn what they need to know to make the most of what's on offer.

A personal touch, be it presentations, a helpline or one-to-one meetings help to bring all of this to life (both during consultation and in a world outside of TPS).

Imagine being offered a one-to-one meeting with a pension and benefit specialist as part of an induction process? Surely a good first impression for any prospective employee and a clear demonstration of the importance placed on benefits and the high regard the school has for its teachers.

Whether or not you are still considering your options in terms of teachers' pensions or have a new benefit structure in place, we firmly believe in the importance of not only the best benefits you can reasonably offer but, equally, finding the best way to make them mean something.

## Teachers' pensions lunch and learn sessions

**Tuesday 12 August, 12.30pm**

**PREPARATION:** If you're considering a review of the TPS, or its Scottish equivalent, this session will walk you through the key options and offer practical guidance on how to prepare effectively.

**Wednesday 13 August, 12.30pm**

**PROCESS:** For those about to begin consultation or already navigating it, our experts will share real-life experiences and top tips to help you manage the process smoothly.

**Thursday 14 August, 12.30pm**

**POST-PENSION CONSULTATION:** If you now have a DC pension scheme in place – whether as your only scheme or alongside TPS – this session will explore what good ongoing governance, employee communication and risk management look like, so your teachers can truly value and maximise their pension benefits.

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# International education continues to be one of the most dynamic and promising segments within the global education landscape.

The British international school sector continues to grow significantly, with thousands of institutions now delivering UK curricula to pupils across the globe. This global expansion of British education not only supports the UK's economic ambitions – contributing to the Government's goal of increasing education exports to £35 billion by 2030 – but also plays a vital role in enhancing the UK's soft power. British schools abroad serve as cultural ambassadors, promoting UK values, academic excellence and global citizenship in diverse contexts.

So, what should schools consider when looking to establish an international presence?

For UK independent schools considering expansion into international markets, early support and guidance can make a significant difference. As a trusted and experienced voice in the sector, ISBA's sister association, COBIS, works closely with schools at the very earliest stages of their overseas journey, offering expert advice on everything from governance and compliance to safeguarding and curriculum. COBIS' Provisional School status is specifically designed to support schools in the planning or pre-opening phase, providing a structured, quality-assured pathway that reflects the standards and ethos of British independent education.

In addition to COBIS, schools can also draw on support from ISC Research, which offers in-depth data and market intelligence and from the UK Department for Business and Trade (DBT), which provides practical guidance, export support and access to international opportunities through the UK's International Education Strategy. Together, these organisations form a robust network of expertise that enables UK schools to export their educational DNA overseas – building

on a legacy of academic excellence and extending their values and vision to new communities around the world.

## Local partnerships

Embarking on overseas expansion is an exciting opportunity, but it also requires careful long-term planning, a strong understanding of the local context and consideration of the operational, legal and cultural dynamics involved. One of the most important factors in setting up a successful international school is establishing and building the right partnerships. Collaborating with trusted local entities in the region or country where you intend to establish your presence can make a substantial difference in both the ease and success of the venture.

Local partners can provide a wide range of critical support. In many cases, they can offer financial investment to help bring the project to life. They may also have existing networks and contacts that prove invaluable – for example, assisting in identifying and securing suitable real estate, navigating local regulations or facilitating introductions to key government departments, ministries of education, or other relevant decision-makers. Such relationships can accelerate timelines, reduce risk and help schools integrate more seamlessly into the local education landscape.

It's important to note that every partnership is unique and should be tailored to reflect both the specific circumstances of the host country and the strategic goals of the school.

According to an article published by School Management Plus, there are generally two types of agreements that define these kinds of partnerships.

The first is a **development agreement**. This type of agreement grants the local partner exclusive rights to develop a certain number of schools

in a defined geographical region, over a set period of time.

The second is an **operating agreement**, which licenses the local partner to run those schools using the UK school's brand and identity. In this arrangement, the partner commits to upholding the standards, values and ethos of the original school, ensuring consistency across locations.

In addition to forming the right local partnerships, there are also sector-specific organisations that can provide expert insights, guidance and support throughout the expansion process. One such organisation is ISC Research, which offers in-depth data, market intelligence and strategic outreach services to help schools assess opportunities and make informed decisions.

Furthermore, schools can benefit from government-backed initiatives. The UK's Department for Business and Trade (DBT) plays a key role in supporting educational institutions as part of the UK's International Education Strategy. The DBT aims to help deliver the UK Government's target of growing education exports to £35 billion by 2030. To support this goal, they offer a variety of resources including export advice, market insight reports, tailored training and, in some cases, financial assistance. Both ISC-R and the DBT can support schools in both choosing where to expand and in finding a reputable partner.

In short, expanding overseas is about more than finding a new location – it's about building the right relationships, understanding the market and having access to the right tools and support. With the right strategy in place, international expansion can unlock incredible opportunities for schools looking to grow their global footprint and impact.

## Understanding the legal and regulatory environment

One of the most crucial aspects of establishing a school overseas is gaining a clear and thorough understanding of the legal and regulatory landscape in the host country. This should be one of the earliest focuses when planning an international expansion, as the legal framework will influence







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virtually every aspect of the project – from how the school is registered and governed, to staffing, taxation and day-to-day operations.

Each country has its own set of laws and regulations governing education and these legal requirements are often complex and subject to change, meaning schools must have up-to-date, in-depth knowledge of what compliance looks like in the local context. This includes understanding licensing procedures, registration protocols, data protection laws, health and safety standards and any specific requirements related to employing international staff or using foreign curricula. Schools are recommended to take specialist legal advice before entering into any overseas agreement.

One important area that must not be overlooked is tax. If your school plans to deploy UK-based staff to work in the overseas campus, it's essential to fully understand both the UK and local tax implications. Tax liabilities can differ based on the nature of the work, the length of employment and whether any double taxation agreements exist between the UK and the host country.

▲ If your school plans to deploy UK-based staff to work in the overseas campus, it's essential to fully understand both the UK and local tax implications

Failing to comply with local legal requirements can lead to costly delays, reputational risks, or in severe cases, legal action. Therefore, a proactive and well-informed approach – supported by expert legal counsel and reliable local partnerships – is critical for any school looking to establish a strong and sustainable presence abroad.

### Reputation and quality assurance in international school expansion

When setting up a British international school overseas, you'll soon find that internationally, educational standards vary. While a British education is widely respected around the world, educational standards can vary significantly from country to country. Many regions may not have the same level of expectations when it comes to crucial areas such as safeguarding, teacher recruitment, or health and safety. For example, some jurisdictions may lack formal safer recruitment practices or operate with minimal health and safety protocols, making it even more important that your school sets and maintains a higher bar.

A critical question for any school entering a new international market is: how can we ensure our overseas school matches the high-quality educational provision families expect from our UK operations? This is especially important for schools that have built a strong brand based on trust, academic achievement and pastoral care. It's essential that families, staff and regulators see your international school not as a diluted version of your UK school, but as a comparable, high-quality institution operating in the context of the local culture in its own right.

This is where accreditation and external quality assurance can play a key role.

The British Schools Overseas (BSO) accreditation scheme, administered by the UK Department for Education (DfE), offers a recognised pathway for overseas schools to demonstrate that they meet the same standards as independent schools in England. Schools that undergo a successful BSO inspection are recognised as delivering a British-style education that aligns with the expectations of the English





# International expansion calls for thoughtful strategy, trusted local partnerships, a sound understanding of regulatory environments and an unwavering commitment to quality assurance.

education system – including areas such as safeguarding, leadership, curriculum and pupil welfare. The accreditation is carried out by approved inspectorates and accredited schools are listed on the UK government website, offering assurance to parents, staff, and partners that the school meets rigorous benchmarks. For UK schools establishing campuses overseas, achieving BSO status can be a powerful way to reinforce their reputation for excellence and reassure families of their commitment to delivering high standards internationally.

One of the leading organisations supporting British international schools in this area is the Council of British International Schools (COBIS). With more than 320 member schools operating in over 80 countries worldwide, COBIS is recognised for its rigorous standards and its dedication to promoting excellence across all stages of a school's development.

For schools that are still in the planning and pre-opening phase, COBIS offers Provisional School status. This accreditation route is specifically designed for new schools that are scheduled to open within the next one to two years and want to demonstrate a strong commitment to quality from the outset. To achieve COBIS Provisional School status, schools must show evidence of high standards across five key domains:

1. the nature of the school;
2. staffing;
3. pupils and curriculum;
4. facilities; and
5. governance.

One of the challenges that many new international schools face is that most inspectorates will only conduct full inspections once a school is fully operational. This can leave a quality assurance gap during the critical pre-opening phase. COBIS

addresses this challenge directly by working with schools from the very beginning, offering expert support and a structured framework that takes local context into account while maintaining UK-level expectations.

COBIS' accreditation team provides tailored guidance to help schools prepare for long-term success – from policy development to curriculum design, from recruitment processes to leadership structures. Their approach balances international best practice with a deep understanding of the educational landscape, ensuring that your school can be both globally credible and locally relevant.

Many leading UK school groups and international campuses have already benefited from this support. Notable examples include Charterhouse Lagos, Shrewsbury International School Phnom Penh, The King's School, Vattanaçville in Cambodia, and Wellington International School, Pune, India – all of which began their journey as COBIS Provisional Schools.

As described by the head of Lady Eleanor Holles, Foshan, a former COBIS Provisional School: "We wanted expert guidance on quality assurance for the early development stages. COBIS very quickly became the backbone to the initial opening phase when writing policies and deciding how to implement an ethos which would define us as an outward-thinking international school".

In an increasingly interconnected world, British independent schools have a unique opportunity to share their values, standards and educational expertise with a global audience. But international expansion is not without its complexities. Success requires more than a strong brand – it calls for thoughtful strategy, trusted local partnerships, a sound understanding of regulatory environments and

an unwavering commitment to quality assurance. With demand for international education growing rapidly, now is the time for UK schools to explore global opportunities with confidence and care. By combining a clear vision with the right guidance and support, schools can build meaningful, sustainable international ventures that uphold their reputation and deliver exceptional outcomes for pupils and communities worldwide.

We're always happy to visit UK schools to meet with heads, bursars, COOs and governors to explore international opportunities – in fact, we greatly value these conversations, which often mark the start of a long-standing relationship.

Alongside our direct support for schools, COBIS works collaboratively with key sector partners to champion British education internationally. We are proud to be an Affiliate Member of the ISBA, and our organisations are strongly aligned in values and philosophy. Notably, colleagues from ISBA's senior leadership team have spoken at our COBIS conference for bursars, business managers and HR professionals – underlining our shared commitment to supporting the operational and strategic leaders behind UK school expansion.

Please get in touch with COBIS if you would like information and support on setting up a British international school overseas! ➡



Author

**Colin Bell**

Chief executive, COBIS

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



# Developing a crisis communications plan – a positive experience

This article follows previous pieces published in Bursar's Review Summer 2024 (page 34), Autumn 2024 (page 76) and Spring 2025 (page 56) explaining the need for a crisis communications plan, what it should include and how that knowledge can be tested. Here, *Julian Hunt*, bursar of Somerhill, a prep school in Kent, shares his experience of developing his school's plan with *Chris Lewis*, director at Crisis Communications Audits.

## How did the decision to develop a new crisis communications plan come about?

When I arrived at Somerhill the documentation that existed was somewhat out-of-date and had not been recently reviewed.

As things stood, in a crisis, the senior leadership team (SLT) would discuss the issue. The head would decide what actions we would take following input from the SLT, and the head's PA would start creating communications for parents, staff and external audiences (if required).

In the main, staff were unsure of their roles in the communication process or where to get the information they needed. Improving this process was very much on my 'to do list', as was making sure the process was then regularly reviewed.

From my own experience having dealt with incidents both in the education and commercial sectors and reading headlines every day about other schools, I knew that not having a 'fit for purpose' plan was playing with fire. Like most insurance policies, I hoped we'd never need it, but I wanted to demonstrate to the governors that we had a plan and were ready to implement it if needed.

## How did you persuade the head to outsource the development?

Fortunately, the head immediately recognised the importance of having an up-to-date plan. He'd had first-hand experience of a crisis at a previous school and had undertaken media training.

## What was the process?

A review was conducted by an external communications agency, including 20-minute interviews with each member of the SLT and the chair of the board of governors, reviewing all the documentation before findings were presented to the SLT with benchmarks.

Phase two was a session with the SLT to agree what should go into the manual, and a session with our marketing and admissions team on writing sample communications templates for different scenarios using the language and tone of voice of Somerhill.

From that, our manual was created – it's about 30 pages long and has sample templates to use and forms to record actions in a crisis.

The team then ran a training session with the SLT so they knew how to use the manual. Each were given a copy so they could confidently act when off-site. We also gave all the SLT access to a version in the Cloud so they had access to a softcopy off-site if required as well.

The final piece is a regular 'fire-drill,' allowing us to practice a simulated situation and review how the plan works under pressure.

## What did you discover during the process?

We learnt so much – for instance, the need to update switchboard voicemail immediately, to have media monitoring alerts and much more.

Also, because so many incidents happen when a school is closed or when the SLT are away without remote access – the value of having printed copies of the manual off-site. We are also now working with organisations that hire our facilities out of hours to understand their plans as well, should an incident arise while they are on site.

## How do you sum up this experience?

Developing a plan has given the SLT newfound confidence and clarity of thought so that everyone knows what their actions are when an incident happens. We were guided through the process and now we are 'incident ready' despite all the other current pressing demands in the day-to-day running of a school.

It is easy for crisis communications plans to stay on the 'to do list' and never quite make it to the top, but a little effort now can really give you that peace of mind. After all, it is too late to start trying to formulate your plans once something has actually happened!



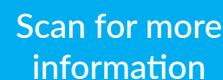
Author

**Chris Lewis**

Director, Crisis Communications Audits

 [www.crisiscommunicationsaudits.co.uk](http://www.crisiscommunicationsaudits.co.uk)







Minibus licensing is a complicated subject and this is why **this course is so vital**

This course will give **informed professional opinions** for bursars to work with

Schools should have a **dedicated transport manager**

# ISBA approves and launches the in-person advanced minibus management course with Rivervale Minibus

After an absence of six years, we are pleased to be able to point ISBA members and their facilities and school transport managers in the direction of a course that promises to shed light on the confusing and often overlooked area of minibus safety and legal compliance.

**Having purchased Castle Minibus in 2023, Rivervale have taken on the mantle of minibus safety education and have reinvigorated Castle's original course, written in consultation with a senior ex-traffic commissioner.** The revised course now has added input from a specialist transport solicitor and a well-respected health and safety consultant.

**The first day of the advanced minibus management course will be 23 September 2025 at Rivervale Minibus' offices in Bicester, hosted and delivered by the Rivervale team.**

## **Liabilities, responsibilities, legal compliance and safety**

There is so much more to managing minibuses than just the vehicles themselves. Apart from the MOTs and regular services that you'd expect to be needed, there are safety inspections, walk-around checks and age restrictions on tyres. All are needed to maintain a roadworthy vehicle which is your legal responsibility. On top of that there are the drivers to manage; their licences, what they can drive, when they can drive, what their responsibilities are, and the policies and procedures of

which they need to be aware. You also have risk assessments for journeys, emergency protocols, drivers' breaks and supervision to consider as you plan the use of your minibuses.

When a member of staff is given new responsibilities such as SEN coordinator or fire marshall, these roles come with additional training and courses are abundant. However, for those given the responsibility of managing the minibuses training, options are extremely limited. This could be down to the fact that schools just aren't aware of the legal requirements and health and safety concerns that surround minibuses.

## **Health and safety considerations**

Arguably, taking groups of children out on the public highway is going to be one of the most high-risk activities a school will do and so there is a big health and safety cross-over with minibus management. Driver and passenger safety is a health and safety issue. Michelle Pearson, of Pearson Webb Consulting, who has more than 20 years' experience in managing H&S within the education sector, considers minibus management a major health and safety concern and has been consulted on this advanced course ►

▼ Schools may have policies, procedures and risk assessments in place for their minibus operations, but they're not always suitable and sufficient







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# Arguably, taking groups of children out on the public highway is going to be one of the most high-risk activities a school will do.

to offer insight from a health and safety auditing perspective.

Michelle said: "Most of our clients are within the independent school sector and have charitable status so they are operating under a Section 19 Permit. When I am auditing, I generally see a real lack of what I would call 'management oversight'. Schools may have policies, procedures and risk assessments in place for their minibus operations, but they're not always suitable and sufficient, and there's often no internal monitoring processes in place to ensure that they're being effectively implemented which can lead to huge gaps.

"This course is a great opportunity for me to share exactly what I would be looking for when auditing a school's minibus operations. It is not just about having the right processes in place for the vehicles, drivers and journeys; it is about ensuring that they are being followed – every day.

"There is a huge cross-over between what I am looking for from a H&S compliance perspective and what the DVSA and Section 19 permits require. This course will make what is required abundantly clear, as well as provide advice on how to make this happen.

"I am really pleased that this resource is being created, and whilst I will be giving professional advice, I will also be sharing anecdotal evidence that will help schools understand the importance of getting this right".

## Legal Insights

There are grey areas and conflicting advice when it comes to minibuses especially with regards to whether teachers are driving for hire and reward, what is legally required

maintenance and what might be the consequences of not following the DVSA's 'recommendations' on maintenance and training.

There have not been many test cases where school minibuses are concerned, certainly none covering all the concerns and questions we hear at ISBA.

In November 2018, Bridgend Borough Council was fined following the death of a 15-year-old boy hit by a school minibus on school grounds. The teacher who drove the minibus was not prosecuted but the Health and Safety Executive brought a case against the Borough Council for not addressing 'hazardous' issues with bus parking provision.

In February 2019 deputy traffic commissioner, John Baker, refused to return four vehicles (impounded in December 2018) to a school when granting an O-Licence because they were previously being used for hire and reward with no O-Licence. When the school applied for their return on the grounds that they didn't know they were breaking the law their request was denied because they had ignored warnings that they must stop all transport activities until they were compliant.

Chris Harrington, of CE Transport Law, has been asked to advise on the advanced minibus management course with specialist legal insight. While he will not be present to answer specific questions, attendees of the course will get a clearer understanding of the law and what the legal consequences might be if schools don't embrace opportunities to improve minibus, driver and passenger safety. ISBA is confident his input and relevant legal case studies will answer many of the questions frequently raised by schools.

## Your questions answered... including who can drive a minibus

One of the questions we are asked the most and which is possibly the most fundamental when it comes to minibuses is 'what licence do you need to drive a minibus?' Minibus licensing is a complicated subject with many determining factors and this is why this course is so vital.

If you drive a minibus for a profit-making organisation you will need to upgrade your driving licence to include full D1 entitlement and gain your Driver CPC (Certificate of Professional Competence). The organisation will need to apply for a PSV Operator's Licence.

Full D1 entitlement means you have completed the D1 theory and practical test as opposed to having 'inherited' D1 (101) entitlement on your licence because you passed your test before 1 Jan 1997, (101) meaning not for hire or reward.

If you drive a minibus for a non-profit making organisation and they operate under a Section 19 Permit instead of a PSV Operator's Licence, you can drive a minibus and be paid to do so, if you have inherited D1 (101) on your licence, or have taken the full D1 test.

Drivers who have category B driving licences and do not have D1 entitlement can drive minibuses for non-profit making organisations under certain conditions:

- the organisation holds Section 19 permits;
- the gross vehicle weight (GVW) of the loaded minibus is 3.5 tonnes or under (4.25 tonnes with specialist wheelchair equipment);
- drivers are not paid anything more than out-of-pocket expenses;
- drivers are over 21; and
- drivers have been driving for more than two years.

It is recommended that all drivers undertake MiDAS (Minibus Driver Awareness Scheme), a nationally ►



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recognised scheme that delivers theory and practical training every four years. However, this is not a mandatory requirement.

### What the course will cover

The advanced minibus management course will keep the tried and tested structure of the online course with four distinct sections:

#### 1. The legal framework

Covering Section 19 Permits, Restricted Operators Licences, driver's licences, who can drive what vehicles and how that should be safely managed and passenger categories under a Section 19 Permit including who you can carry and lend your buses to.

#### 2. Safer vehicles

The differences in driving minibuses verses cars, and the challenges teacher-drivers face, vehicle maintenance requirements including daily/weekly checks and safety inspections as well as tips on avoiding common bumps and scrapes.

#### 3. Safer drivers

Effectively managing drivers, driver training, licence checks and their health and welfare as well as the drivers' responsibilities and liabilities. Health and safety concerns regarding fatigue, minibus key security and driver training.

#### 4. Safer journeys

Planning for safer journeys including risk assessments, supervision, emergency protocols and procedures and often-overlooked elements.

### Best practice

John Peterson, director of Minibus Services at Rivervale, who was involved in the original course said: "Managing minibuses day-to-day, who can and can't drive them and what can and can't be done under a Section 19 Permit remains one of the most confusing and

undervalued topics for discussion in schools throughout the UK.

"I have recently been involved in podcasts and webinars where it is apparent that schools and organisations want to get it right but are still very confused and under-educated about even the most basic issues. We recently went into one school who had been operating minibuses without either a Section 19 Permit or an Operator's licence for years.

"We have always striven to give best practice advice on the minibus management course, which has now been fortified by the input from Michelle Pearson and Chris Harrington.

"Effective minibus management is not a nice-to-have. There are legal and health and safety concerns that need to be taken seriously. I hope that by bringing back this in-person course, bursars, drivers, facilities managers, heads and governors will realise the importance of a robust minibus safety system managed by someone who is trained and empowered to enforce those safety policies where needed".

### The importance of a transport manager

It was in consultation with the Beverly Bell, the ex-senior traffic commissioner in 2018, that the need for a dedicated transport manager within schools became apparent. This should be a role (or a shared role) with responsibilities confirmed in writing, including responsibility for oversight

▼ It is recommended that all drivers undertake MiDAS (Minibus Driver Awareness Scheme) theory and practical training every four years

of any outsourced provision and, importantly, the authority to implement any changes necessary to establish and maintain safer minibus policies.

Launching the new advanced minibus management course at ISBA's annual conference in Manchester this May, John Murphie, former COO at ISBA commented: "ISBA is delighted that Rivervale Minibus is developing this course with valuable legal and H&S crossover content and advice. Together, this course will shed some light on minibus grey areas and give informed professional opinions for bursars to work with. I would urge all our members, and anyone involved in minibus management, to attend this course to improve school minibus safety across the board, as well as to protect organisations from unwittingly falling foul of the law".

**The course is a one day in person course, with refreshments included at £475 per person plus VAT. To book your place on the 2025 dates of 23 September, 22 October or 1 December, or to register interest in course for 2026 please call 01869 253744 or email [minibus@rivervale.co.uk](mailto:minibus@rivervale.co.uk) Places are limited.**

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# The ISBA Business Directory



ISBA's online business directory provides details of suppliers and professional advisers to independent schools across the country and is frequently visited by bursars and senior management professionals in ISBA member schools. It is available to members on the member side of the website and is also open to all on the public side of the site and gives schools the opportunity to search for specialist suppliers quickly and easily.

## An ISBA Business Directory listing offers companies all the following benefits:

- your company details included in the directory, promoted regularly to our members, through to the end of 2025;
- a central platform to engage with procurement decision-makers in more than 1,300 ISBA member schools putting your business in front of 6,500+ school staff;
- a chance to demonstrate your commitment to quality service to independent schools through the sector's largest association;
- an opportunity to showcase your company's products and services with enhanced brand visibility options;
- the ability to highlight special offers and discounts specifically for ISBA members; and
- use of the ISBA Directory Partner kitemark (at Platinum entry level only).

Take advantage of recently reduced prices and secure an entry in the Directory for the remainder of 2025, full details can be found on the ISBA website at <https://isba-referencelibrary.org.uk/BusinessDirectory/Index> together with information on the packages available and how to apply for a listing. An additional discount is also available if you are currently taking advertising space in the Bursar's Review magazine. **Early bird offer:** Discounted rates are now available on 18-month packages offering entry for the remainder of 2025 and whole of 2026. Email [office@theisa.org.uk](mailto:office@theisa.org.uk) for further information.

## ISBA Business Directory benefits for member schools

The ISBA Business Directory is designed to make it easier for ISBA members to find out

more about the services and products available to them. It provides a convenient source of school-related products and sector advisers, thereby enabling the association to continue to deliver its comprehensive support services to member schools and to help you find the right solutions for your school.

The number of companies taking a Directory entry continues to grow, and within the Directory you will find 12 business categories, covering a wide variety of products and services, all fully searchable by business type, region or by location of supplier. If you're looking to source services or suppliers please ensure you take advantage of this valuable member resource.

Whether you are a company looking to take a Directory listing or a member school looking for a supplier or service, please scan the QR code above to take a look at the ISBA Business Directory. ◀



**At inspection** ISI will look for evidence that schools are competently managing risk on an ongoing basis

**Your first challenge** is to identify all the areas in your school that you feel warrant regular audits

A school should not rely on the outcome of a **positive audit** to relax its due diligence

# New ISI guidelines for effectively managing risk in schools

*Rachel Attack*, former deputy bursar and head of HR, drives home the necessity of thoroughly organising and managing compliance in every single area of risk. To let things slide leads to disastrous reputational damage.

**There's absolutely no denying that the 2024/25 academic year has presented some of the most challenging times ever seen in the independent school sector.**

Proprietors and management are fully occupied in navigating a whole host of significant changes to the running of independent schools.

To name just a few:

- preparing for inspection under the ISI inspection framework;
- the introduction of VAT to education and boarding fees from January 2025;
- the removal of charitable status business rate relief;
- preparing for the new Labour Government's Employment Rights Bill;
- the introduction of the Children's Wellbeing Bill; and
- ongoing decisions for many schools relating to Teacher's Pensions.

This is all in addition to the delivery of the core purpose of our schools, to safeguard and provide excellent care, wellbeing and teaching to our pupils. School management, teachers and support staff are carrying this extraordinary pressure and over recent months we have all heard of more independent schools that have sadly been forced to close.

Creating yet an additional challenge for schools, the ISI framework states

▼ The 2024/25 academic year has presented some of the most challenging times ever seen in the independent school sector

that schools must consider '*adapting existing risk strategies as necessary to identify and manage the risk to pupils' wellbeing*'. It is therefore vital that schools keep a sharp focus on managing risk appropriately within all areas of their school, ensuring both the safeguarding of children and the future-proofing of schools.

## A key risk management area

One of the key risks for schools, often underestimated, is the risk of a non-compliant single central record (SCR), due to the failure of the school to adhere strictly to all the details laid out in safer recruitment legislation and guidance. As schools strive to uphold the highest standards of safety





and compliance, navigating the risk management of safer recruitment can be a daunting task.

We all know that the risk of getting your safer recruitment wrong could result in your school failing inspection, as well as the greater risk of endangering pupils. But the straight question for heads, bursars and governing bodies is: how can you be certain that you are completing your safer recruitment checks correctly and remaining compliant with Keeping Children Safe in Education (KCSIE), the Independent School Standards Regulations and National Minimum Standards (NMS)?

The concern with not having your SCR compliant is both overwhelming and is also a real risk, especially in these busy and challenging times when management have so many other priorities. Believe me, I understand this only too well, having held this responsibility myself. The risk here, is not just that you might fail your inspection, but it fundamentally comes down to the fact that if schools are not adhering to the regulations and guidance, then they are not putting pupil wellbeing at the forefront and are not proactively keeping the children from harm. The school's governing body has an obligation to protect pupil wellbeing by ensuring that the school has a strategic approach to identifying and managing risk. This is not just about preparing for inspections, but schools must now demonstrate how they robustly manage risk between inspections and on a regular and ongoing basis, whether that be monthly, termly or annually.

### Managing and mitigating risk

So, what is the answer to appropriately managing and mitigating this risk? Let's use the same example of the SCR. In order to manage the risk of your SCR being non-compliant, it is essential to ensure that regular audits are put in place. It is important that these audits are rigorous and get into the right level of detail. Many schools do their own

regular internal audits of the SCR, but the depth that they go into and the due diligence undertaken is often not enough to be confident that the pupils' welfare is being properly protected.

Some independent schools already have regular checks of the SCR, during which the safeguarding governor, head or designated safeguarding lead will sit down with HR to check that the dates on the SCR align with the dates on the file. This is of course good practice, but the fundamental aspect missing from this is the detail and the evidence of complying to the guidance and legal obligations:

- Who is checking that the correct three pieces of ID have been checked?
- Who is checking that the ID has all been original documents and is not, for example, an online bank statement?
- Who is checking that the bank statement is dated within the past three months?
- Who is checking how the school manages processes and paperwork from lettings and hirers?
- Who is checking that the school is meeting the expectations of ISI in relation to the leadership and management of safeguarding risk?

This isn't just about validating that the dates on the SCR match the dates of checks that have been carried out. This is a deep dive to be confident that you are actually carrying out the correct checks.

Of course, governors and school management may not have time to scrutinise files to this degree with all the pressures and workloads they are dealing with. There are also many schools that feel that the SCR sits firmly within HR and no internal audits are ever carried out by other school management outside of HR.

The reality is, that however brilliant your HR department is, we know how stretched they are. With all the changes in legislation, coupled with the business-as-usual challenges of managing HR, payroll, disciplinaries, policies etc, there is rarely the time to

devote to an in-depth and full audit of the SCR, thus posing a real risk to your school and to your pupils.

Many HR professionals coming to work in school have no educational background and are unfamiliar with the complex world of safer recruitment. As school management will be only too well aware, it only takes one staff disciplinary investigation or a subject access request, to consume all their time and naturally, the audit of the SCR falls to the bottom of the list, thus putting pupils at the risk of harm. Working in school management is a heavy responsibility and the reality is that some schools will need specialised support to fully mitigate the risk and to comply with the ISI guidance.

The impact of not carrying out these risk audits is threefold:

1. risk of harm to pupils;
2. risk of harm to your staff; and
3. the reputational risk, which may lead to pupil departures and challenges in the school's admissions process.

### What the ISI framework says

How do you address the ISI framework and start to successfully manage your school's risk? How do you take appropriate action to reduce risks that are identified? Of course, in some areas, you may be able to manage your risk audits internally. However, for something as significant as the SCR, which can result in both harm to pupils and significant issues at inspection, one answer may be to turn to an industry professional to carry out an annual independent audit on your behalf.

The new ISI inspection framework is very clear about the need to manage risk appropriately. If you refer to 'Section 1: Leadership and Management, and Governance', then you will find a whole section on 'Understanding and Management of Risk' specifically paragraph 45 which states that *'leadership must safeguard and promote the wellbeing of pupils through effectively identifying risk of harm and take appropriate action to reduce risks that are identified'*. ➡



In addition to this, paragraph 46 states ‘adapting existing risk strategies as necessary to identify and manage the risk to pupils’ wellbeing’.

ISI will not view managing risk as a one-off tick box exercise; at inspection they will be looking for evidence that schools are competently managing risk on an ongoing basis. They will want to see evidence of regular audits and competence in this area. This will, in turn, help to reassure inspectors that the school is operating competently and protecting their pupils.

### Your challenge

We all know that schools are now operating more like businesses and you only have to look at the professional services sector, where independent annual audits are carried out in compliance, finance and IT to know that this is a robust and sensible practice.

Undoubtedly your first challenge will be to identify all the areas in your school that you feel would warrant regular audits. We have discussed the single central record here but, of

course, there are many other areas, for example site security that will also need regular, documented scrutiny.

The second challenge will be creating space, time and expertise to create the structure and to carry out these audits. One consideration will be is who is the best person to carry out your risk audit. This may be based upon a number of factors including available time, cost and in-depth expertise. This will be down to whether you feel that the person who holds responsibility for the risk can also be the person who can audit your risk or whether you will require a specialised independent person, as you will already do for your health and safety audits.

Regardless of the manner in which you choose to carry out the audit, the fact remains that moving forward, ISI will be expecting a rigorous and regular audit of areas such as the SCR, and for those of you who attended ISBA’s annual conference this May, you will have no doubt heard this being discussed. If you are one of the schools who are lucky enough to have a few

▲ Annual SCR audits will provide your school with the best possible platform to achieve sustained excellence

years before their next inspection, then use this to your advantage. You will be able to evidence to ISI the steps you have taken to mitigate risk over a regular timeframe. These annual SCR audits will provide your school the best possible platform to achieve sustained excellence and futureproof yourself in the competitive independent school market. ◀●

**ISBA note:** An SCR audit is only a snapshot and whilst a school may appear compliant as at the date of the audit, a clear audit does not absolve the school from the need to keep the SCR continuously up-to-date and the school should not rely on the outcome of a positive audit to relax its due diligence.



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*Realistic allowances* should be made for any unknowns on your project

Undertake a *thorough review of cost at key milestones*

*Value engineering is an ongoing process*, not just used to bring an initial budget back on track

# Mastering your school building project budget

Managing costs on a school building project requires careful planning, monitoring and control, so *Rob Buckley* of Synergy Construction and Property Consultants LLP, suggests a few key areas to consider from the outset.

**Developing a well-considered budget at the beginning of a project is essential. It serves as the foundation for successfully driving your project forward.**

The first and most important step in defining a budget is to ensure there is a thorough understanding of the project scope and requirements. By clearly identifying the key project deliverables and timelines at the outset, you can ensure that all aspects of the project are accounted for, leading to more precise cost estimations.

Stakeholder engagement is also a crucial aspect of any initial budget planning process. Without involving key stakeholders in the initial planning stages, their later input might introduce new requirements or changes that were not initially accounted for.

It is also essential that the initial budget is based on current costs and comparable projects. Your quantity surveyor will be able to provide relevant benchmarking data which is vital in informing initial project budgets.

Realistic allowances should also be made in the initial budget for any unknowns on your project. This is also where the skills of your quantity surveyor will add significant value.

They can advise you on any areas of potential risk and ensure that sensible allowances are provided in the initial budget, as well as guide you on inflation allowances and an appropriate project contingency. They will also advise you on any surveys and investigations that can be carried out to mitigate unknowns.

A carefully prepared budget will be a crucial tool for demonstrating the

affordability of your plans as part of your forecasts and scenario modelling to both the governors and, if needed, the bank. It would be unwise to progress further into detailed design without having secured this approval in principle.

You've now sorted funding for your project and your design is finally underway!

Regular monitoring of the actual costs against the initial budget is essential during design development. Your quantity surveyor will be closely monitoring project costs and undertaking detailed elemental cost planning and regularly sharing ►





their reports with you. They will also share this information with the project team and stakeholders, which is crucial in keeping everyone informed and to help identify any cost issues early.

To help you stay in control as the design progresses it's important to ensure you undertake a thorough review of cost at key milestones (such as the end of each RIBA stage) to ensure that it meets your budget expectations.

It is also important to keep a close eye on scope creep as the design progresses. Additional features or changes often occur on projects during the design development stage and although on the face of it these requests may seem minor, they can impact other elements of the project. This can lead to incremental changes that accumulate over time, resulting in scope creep which can significantly impact your budget and/or timeline.

Furthermore, stakeholders can change their minds or priorities as the project progresses, necessitating design revisions and expansions to the original scope. It is important that the impact of this change on budget is fully explained to stakeholders before implementation, so that budget expectations are kept in check.

It is important that value engineering is an ongoing process and not just implemented to bring an initial budget back on track.

Quantity surveyors can be central to this process, bringing their expertise in cost management, risk assessment and financial analysis to ensure that value engineered solutions align with your project goals.

They will support you by exploring alternative solutions, such as evaluating different construction methods and materials and the impact of phasing of works. This could include looking at the benefits of modern methods of construction (MMC) such as modular solutions. It is important any alternative solutions are thoroughly reviewed to ensure that there is no detriment to the project's intended functionality or quality. There may also be insurance implications for the completed building – a further factor to consider.

It is also important that all the members of the project team are engaged during any value engineering process and that recommendations are well documented and clearly communicated to the key stakeholder. This will then support confident decision making and safeguard project momentum.

A well-considered procurement strategy is essential for managing a budget effectively. This involves a full assessment of different procurement options to determine which one aligns best with your project's objectives and needs. This process examines factors such as risk distribution, incentives for cost control and the overall project requirements.

Common procurement routes can differ from each other in relation to:

- the client's exposure to financial uncertainty;
- programme timelines;
- the degree of control that the client has over the design and construction processes;
- the extent of design information required at the time of tender;
- the information required at the time that construction work can commence; and
- the extent of involvement by the contractor and the supply chain in the design stage, when these parties may be able to contribute to the design and planning of the project.

Your quantity surveyor will take the necessary time to understand the best strategy for your project and will be able to evaluate all available routes, including traditional, design and build and contract management. They'll assist in drafting and reviewing contracts

to ensure all financial and legal aspects are covered, reducing the risk of dispute.







Without involving key stakeholders in the initial planning stages, their later input might introduce new requirements or changes that were not initially accounted for.

Witnessing your project materialise on-site is highly gratifying. Nevertheless, maintaining cost control is essential to ensure the project's success and adherence to your initial budget.

At this stage, progress can accelerate markedly and it is imperative that you have a thorough understanding of your budget as your project evolves on-site.

It is important that your quantity surveyor provides regular, detailed financial cost reports to you and your design team. Summaries of these reports will also be crucial for reporting to governors and, if appropriate, to the bank.

They will also conduct regular site visits to inspect and value the work and make payment recommendations to the contractor.



As part of their formal cost reporting they will identify all known variations regardless of whether a formal instruction has been issued and review all defined provisional allowances yet to be expended. This enables you and


your design team to make informed decisions when unknowns arise on-site or variations are being considered.


They will also monitor actual cashflow against projections to highlight any programme issues.

Collaborative engagement among the entire project team is crucial at this stage, ensuring that monthly valuations accurately reflect the work completed to date.


Your quantity surveyor will also assist in facilitating the agreement of the final account with the parties to the building contract. Their role is to act impartially, ensuring fair payment and protecting you against overpayment or defective work.

By adopting these approaches you can effectively manage costs and ensure the successful completion of your school building project within the allocated budget. ◀●





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*Many pupils* are actively encouraging their schools to adopt greener practices

Renewable energy providers can now match energy generation against demand on a *half-hourly basis*

Visible commitments to sustainability present *powerful educational opportunities*

# Why schools should feel empowered to unlock sustainable energy

Renewable energy isn't just a green ideal; it's fast becoming a financial and reputational imperative for schools looking to future-proof their operations, says *Tim Foster*, director of energy for business at Conrad Energy.

**From heating classrooms to powering computer suites, energy is an increasingly significant line item draining school budgets across the UK.** As schools grapple with soaring utility bills and tightening operational margins, the pressure to reduce costs while meeting ambitious sustainability targets is intensifying.

At the same time, the Government is continuing to increase pressure on schools to boost their sustainability credentials and 'green' energy has also been highlighted as a potential cost-saving measure. Indeed, a recent announcement on Great British Energy acknowledges the 'rocketing energy bills' that schools have been hit with and outlines plans for solar panels to be installed across 200 state school sites. While some of these may arrive as early as this summer, the wider investment is pledged as part of a long-term plan that will offer returns over the next 30 years.

But is there a way for schools to reap the benefits of solar power – and indeed other forms of sustainably sourced power – quickly and independently?

## **Sustainable access to sustainable assets**

Behind-the-meter assets (i.e. on-site energy systems like solar panels that directly serve the building's energy needs) could provide the cost, carbon and credential solution that many schools have been seeking.

Concerns about high up-front costs and inaccessibility can deter businesses and organisations from exploring these alternative energy sources, but these concerns are often misplaced. Instead, it is very possible for schools to reap the rewards offered by behind-the-meter energy.

Energy companies can install these assets as part of a power purchase agreement (PPA). These agreements

cover the upfront capex costs of installation and the energy is then sold to the school at a pre-agreed and fixed rate, for a set length of time. Amid the unpredictable financial landscape schools have been thrust into this year, compounded by the volatility in energy markets, this price security and longevity is particularly valuable.

For every school that can accommodate such assets on large campus grounds and roof tops, there are also those for which space is more limited. For schools with smaller sites, corporate PPAs offer a useful alternative. In these arrangements, the school instead purchases renewable energy which has been generated at sites located further afield, which is then transported through the electricity grid to the main school site – again on long-term, fixed energy rates.

## **Demand for sustainability**

Sustainability is becoming an increasingly important consideration



for schools, driven not only by financial constraints but also by rising expectations from pupils, parents and government bodies. Many pupils are actively encouraging their schools to adopt greener practices, with a growing number of institutions signing up to national initiatives such as Let's Go Zero.

Government policy is reinforcing this shift in priorities. Since 2023, the Department for Education has required all education settings to appoint a designated sustainability lead and to implement a formal climate action plan.

This wider trend is supported by data from a 2023 white paper published by the Independent Schools Council and Planet Mark. The report found that 45 percent of independent schools now regard sustainability as a high or very high strategic priority. In response, 82 percent of schools have introduced sustainability champions or green teams, with almost 80 percent directly involving pupils in these groups. Despite these encouraging developments, only six percent of schools currently have a publicly accessible sustainability strategy, and 93 percent have not received any financial support to assist with their sustainability efforts.

These findings demonstrate that while the commitment to sustainability across the independent school sector is strong, there remains a significant need for practical, affordable solutions that enable schools to turn ambition into action.

### The value of proving a point

Renewables are more and more a part of life in the UK and an increasingly important part of the National Grid. Nevertheless, the fact that renewables still flow through the grid alongside fossil fuels and power generated from wider sources can make it difficult for energy users to track the origin of their energy accurately.

For instance, to date, systems for monitoring the sustainability of energy have centred on Renewable Energy Guarantees of Origin (REGO) certificates.

These saw energy generators provided with one REGO certificate for every MWh of renewable electricity produced, as overseen by OFGEM. The introduction of the REGO system was highly valuable and an important step forward for sustainability monitoring, but in practice the certificates merely showed that a business's energy usage could be matched to an equal amount of renewably generated energy.

What's more, the matching was done on an aggregated and typical yearly basis. This meant that, for instance, a supplier could offset energy drawn heavily from fossil fuels in colder months with certificates purchased from a solar farm in the summer when solar energy is much more abundant.

### Walking the green walk

Significantly more accurate mapping systems are now available. Renewable energy providers can now match energy generation against demand on a half-hourly basis, a vast improvement on the annual set up which made close monitoring of usage so tricky. Sophisticated monitoring systems can even record the name and location of the specific renewable assets providing the matched or supplied energy.

These systems, then, not only offer schools a cost-effective path to renewable energy, they also give them the ability to use transparent time-based energy-matching to monitor their consumption – by linking energy usage directly to the electricity which suppliers are producing.

This will allow schools to prove to their pupils and their families – both current and prospective ones – that they are doing more than just talking the green talk, but are actually walking the walk. It will also allow schools to demonstrate progress to the Government, wider stakeholders, investors and commercial partners.

Additionally, the increased data visibility can be used to mitigate schools' financial concerns. Schools can track their energy usage efficiently and

working with their energy providers, can develop bespoke plans to optimise the patterns of their energy usage. For instance, schools may have previously switched some operational processes to happen during the night, due to cheaper 'traditional' energy costs during this time. However, by consulting the data they may in fact find that it is better to switch these operations to daytime, i.e. when they are producing or purchasing the maximum amount of their own solar power. Again, it is the real-time detail offered by these advanced tools which allows schools to streamline their operations far more than has previously been possible.

### Unlocking sustainability

With mounting financial pressures and growing sustainability expectations from pupils, parents and policymakers alike, now is the time for schools to take control of their energy future. Renewable solutions such as behind-the-meter systems and long-term PPAs can offer not only cost certainty but also demonstrable environmental impact. **It should be noted that PPAs are typically complex, long-term contracts and schools should do careful due diligence and take the appropriate advice before entering into such agreements.**

Crucially, these visible commitments to sustainability also present powerful educational opportunities, enabling schools to embed real world energy awareness into the curriculum and inspire the next generation of climate conscious citizens. By embracing these innovations, schools can deliver savings, resilience and climate leadership in one decisive step. ◀●



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## Radon risk

*Every school* must demonstrate they have considered radon in their risk assessments

Plan your radon testing for the *autumn or winter term*

If testing in your school demonstrate a need for mitigation, *act quickly* to comply with the Ionising Radiations Regulations 2017

# The importance of testing for radon in independent schools

PropertECO managing director, *Charles Edwards*, explores the most significant challenges facing independent schools as they strive to comply with the latest regulations, and sets out best practice to minimise the risk of radon exposure to pupils, colleagues and members of the public.

**Radon is a naturally occurring radioactive gas formed from the decay of uranium in rocks and soil that can seep into buildings and become trapped.** While radon levels are generally low outdoors, they can accumulate indoors, especially in buildings with poor ventilation and, if a person is exposed to high levels

of radon for a prolonged period, it can lead to lung cancer. Radon gas is colourless, tasteless and odourless, meaning special testing needs to be carried out in order to detect how much is in any particular building. The higher the level of radon and the longer the period of exposure, the greater the risk will be.

Teachers, staff and pupils have the right to work and study in a safe environment, which is why there is legislation in place that requires a radon risk assessment to be carried out. The Management of Health and Safety at Work Regulations 1999 mandates that employers assess all potential hazards, and this includes radon.





Therefore, every school must demonstrate that they have considered radon in their risk assessments.

Schools are required to carry out radon testing if they are in a radon affected area or if they have a basement which is occupied for at least an hour a week, regardless of geographical location. Compliance with these regulations is imperative and significant financial penalties can be incurred if these guidelines are not followed. It should be noted, of course, that radon is not an issue for all schools, and a useful tool for checking whether your school is in an area affected by radon is by using the UK Health Security Agency (UKHSA) website. Use this link to an interactive map to search by location and radon risk levels: <https://www.ukradon.org/information/ukmaps>

### The challenges for schools

School budgets are under increasing pressure, but the necessity for maintaining exemplary health and safety standards cannot be compromised. Therefore it is essential that either in-house personnel, such as health and safety officers or maintenance supervisors, take responsibility for understanding and managing radon risks. Such staff can receive expert training in this field to understand their obligations and the role they can play in the process of testing for radon. For schools where in-house teams do not have the resources or capability to develop expertise in this area, specialist radon testing and mitigation companies can be engaged to provide services from

strategic consultation to techniques for testing, analysing outcomes, risk reduction and long-term support and reviews.

The consequences of breaches in compliance can be significant and wide-ranging including:

- the increased risk of physical health implications;
- the threat of reputational harm; or
- the prospect of financial sanctions for proven breaches of the legislation surrounding the management and risks of radon.

As an example, in 2023, an independent boarding school in Somerset was fined £50,000 after exposing five pupils and two employees to high levels of radioactive radon gas. At the time, the Health & Safety Executive (HSE) explained that radon is a hazard in many homes and workplaces, and breathing it in is the second largest cause of lung cancer in the UK. The affected pupils were exposed to levels of radioactive radon gas almost eight times the legal limit while studying at the school.

The HSE reported: *'The fine imposed should underline to everyone in the education sector that the courts, and HSE, take a failure to follow the regulations extremely seriously'*.

### What radon testing involves

To demonstrate the importance of understanding the risks associated with radon and the requirement for rigorous testing, I would like to use a real-life example of how the implementation of a bespoke radon testing and mitigation programme

recently benefitted an independent school in Yorkshire.

The school required radon testing across the school's premises, as well as several privately let residential homes following the identification of possible radon risk.

After a comprehensive review of building plans, 240 passive radon detectors were placed by the school across the various school and residential sites. The detectors were left in situ in the buildings for a three-month exposure period, which is the standard duration to obtain a reliable measurement of radon levels.

Upon completion of the testing exposure period, the radon detectors were collected by the school and returned for laboratory analysis. The results indicated that 12 areas within the school had radon levels far exceeding the workplace compliance threshold of 300 Bq/m<sup>3</sup>, with the highest recorded concentration reaching 500 Bq/m<sup>3</sup>.

Six further areas were identified with radon levels surpassing the residential action level of 200 Bq/m<sup>3</sup>, the threshold recommended by the UK Health Security Agency (UKHSA) for all schools to adopt.

Faced with these findings the school then instigated a detailed mitigation design survey. The survey focused on all affected areas, including several basement layouts that came with a set of unique challenges. As such, it was found that a combination of radon sumps and positive input ventilation (PIV) systems would be the most effective approach. ►

Schools are required to carry out radon testing if they are in a radon affected area or if they have a basement which is occupied for at least an hour a week, regardless of geographical location.



A total of 15 systems were required to mitigate the high radon levels.

To blend in with the school's existing external rainwater goods, careful consideration was made when it came to the pipework and grilles chosen to implement the mitigation systems in order to be sympathetic to the surroundings, and not to draw attention to the equipment installed.

To minimise disruption of the school's operations, the installation of the mitigation systems was scheduled during the Christmas holidays and the works were completed over five days, ensuring that the school was ready to welcome pupils and staff back to a safer environment in the new year.

Post-mitigation testing revealed outstanding results, with radon levels in most of the affected areas reduced to below 100 Bq/m<sup>3</sup>. In fact, the admin office that had an initial radon concentration of 468 Bq/m<sup>3</sup>, saw a dramatic reduction to just 4 Bq/m<sup>3</sup>.

In addition to the installation of the mitigation systems, regular re-testing will be conducted at scheduled intervals to continuously monitor radon levels and maintain a safe learning environment.

This case study illustrates how seamless managing exposure to radon can be and how, by adopting a proactive and pragmatic approach, schools can swiftly ensure that risk to building users can be significantly and rapidly reduced.

### Radon strategy checklist

The most important thing for all senior leadership teams to ensure is that radon is included in a school's health and safety risk assessments. The extent to which radon will have to feature will be drawn from several different factors (geographical location, nature of the building's materials, extent to which radon has been historically considered, layout and design of the premises etc), which will be derived during the assessments of these risks, and no two schools will be the same.

Once radon has been included in the risk assessment and the extent of its relevance to the school calculated, there are a few key pointers that all school teams should consider:

1. Test during the autumn or winter term – radon levels can spike during colder months, which is factored in by labs during the analysis of tests, but testing whilst the schools are occupied and active is fundamental to achieve an accurate reading of the risk of radon at its highest level. Do not test over the summer.
2. Test over an extended period of three months to allow seasonal changes and building ventilation variations to be accounted for in the analysis.
3. Tests should cover every 100m<sup>2</sup> of floorspace – while the size and layout of schools are different, but for example 15 monitors may be required for an average prep school and around 70 for a senior school. Many schools will need to include boarding and staff quarters in addition to the main areas of the school, so that number would rise accordingly.
4. When placing radon tests, consult a professional – HVAC systems, type of build construction, mechanical, engineering and plumbing (MEP) infrastructure, occupancy rates and room uses can all impact the results obtained, so seek expert guidance on the best locations to test.
5. Promptly install mitigation – if results of testing in your school demonstrate a need for mitigation, act quickly to comply with the Ionising Radiations Regulations 2017 (IRR17), which require employers to take steps to reduce exposure.

### Radon awareness delivers safer environments

The physical structure of a school is a fundamental reflection on the school's entire philosophy; a demonstration of its aptitudes, a testament to its standards and an illustration of how it

protects those within. Society entrusts schools not just to educate, but to look after pupils, and acknowledging the responsibilities the education sector has to ensure the highest standards of health and safety are adhered to is something bursars and senior managers have been dedicated to for years.

However, the ever-evolving nature of health and safety management and new research continuously presenting fresh challenges for audiences to understand and comply with makes this increasingly challenging. Paired with pressure on school budgets which has been driven by the Government's introduction of VAT on tuition fees and the increased cost of labour throughout schools' teams, it is understandable why testing for radon could shift down the list of a school's priorities.

I hope that this article amplifies both the importance of testing for radon, but also the ease with which the process can be effectively managed. To be compliant with radon regulations gives you and your team peace of mind, it protects the health of everybody who uses the school as a safe place to study and work, it improves your reputation and status, it safeguards you against financial or legal ramifications and ultimately, it is the right thing to do. ◀●



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## Children's declining fine motor skills

**Three-quarters of primary school teachers are concerned that children's ability to hold a pencil, draw or use scissors has worsened over the past five years.**

According to YouGov polling, 77 percent of primary teachers have noticed a deterioration in pupils' ability to perform precise movements since 2020.



## Cheltenham College to open Cheltenham Lombardy in Italy

**Cheltenham College has announced the founding of Cheltenham Lombardy, a new international school located in Varese, northern Italy.**

Cheltenham Lombardy will be a British curriculum, co-ed boarding school for pupils aged 13-18 and will be operated by Edumaax, led by Old Cheltonian, His Highness Tunku Yaacob Khyra.

Steven Geraghty, founding head of Cheltenham Lombardy, said: "We are delighted to be creating a brand new school with all the opportunity that the location and facilities offer us, along with the centuries of combined expertise of Edumaax and Cheltenham College UK. We look forward to creating an inspiring new International School for children from around the world".

## High Court rejects VAT legal challenge

**Julie Robinson, CEO of the ISC, has pledged to continue supporting schools and families after the sector lost its High Court challenge against the Government over its VAT on fees policy saying: "This is an unprecedented tax on education and it was right that its compatibility with human rights law was tested."**

"We would like to thank the claimants who shared their stories on key issues: SEND, faith schools, bilingual provision and girls-only education. It showcased how vital independent schools are for many families and the broad, diverse community choosing what they feel is the right education for their child.

"The ISC is carefully considering the court's judgment and next steps. Our focus remains on supporting schools, families and children. We will continue to work to ensure the government is held to account over the negative impact this tax on education is having across independent and state school".

## Smartphone restrictions lead to socialising, reading and sport

**St Edward's School in Oxford has installed landline phones in every boarding house, with the lack of smartphones leading to a significant change in pupils' activities, The Sunday Times has reported.**

The co-educational boarding and day school reintroduced the landline phones last September after 15 years without them, as part of an overhaul of its mobile phone rules, which aim to reduce mindless scrolling on smartphones in evenings and at weekends.

Between the ages of 13 and 15, boarders may not use a mobile phone, day or night, during the school week. At weekends, they have their phone for only a few hours a day and must hand it in by 9pm.

The school's warden, Alastair Chirside, said: "Since we changed the phone policy, we have seen a massive increase in participation".

Downe House School in Cold Ash near Newbury, Berkshire, an all-girls' boarding school, has also introduced stricter phone measures, which have reportedly increased reading among pupils.

Head, Emma McKendrick, said: "You will quite often see the girls playing board games together, they read more now, but they also sit and talk more".







# Manchester was magnificent!

Here is our round up of our fantastic 2025 conference. Thank you to everyone who attended and we look forward to seeing you at ICC Wales from 11-13 May 2026 to connect, learn and be inspired.









# Conference 2025 – a resounding success

The 2025 ISBA conference was held in Manchester in May. The sense of optimism and positivity from delegates, organisers and exhibitors – given current financial circumstances and pressures on schools – was very encouraging and welcome. It shows the resilience of the sector and proves that there is strength in numbers. Networking opportunities – often rare for bursars – were built in to the programme to make sure that everyone could make the absolute most of their visit.

**The programme was packed, carefully designed to bolster resilience, give advice and reassuring support as the sector comes to terms with a changing and volatile financial world.** As the sector settles into its new normal, delegates will have left the conference with an added confidence that ISBA has their backs and will continue to support its members in every single aspect of running a school as a successful and safe business.

Of course, the emphasis was firmly on the inescapable challenges faced by the sector and the expert advice available to help all delegates find

the motivation and inspiration to thrive. Plenty of time was set aside for networking and socialising – it was an busy few days so the chance to informally set the world to rights with colleagues often in the same boat can be reassuring. Bursars carry a heavy burden and a problem shared is a problem halved. There is always a different perspective to be considered, it just sometimes needs pointing out by someone slightly removed and the conference provides a wonderful opportunity to pick brains and go home with more comfort and confidence. On this theme of self-care, keynote speaker, Alex Polizzi had it right by

advising bursars to switch off from work whenever they can, she said: “It is hard to get a sensible work/life balance, but have very clear boundaries of ‘achievable’ and ‘acceptable’ and put the phone away.

“If you don’t, you put increasing pressure on yourself and your staff”.

The keynote speakers this year were exceptionally well chosen. As well as Alex who comes from the world of hospitality, they included Liam Halligan (economics), Priya Lakhani (tech) and Major Scotty Mills RM (ret’d) whose compelling and emotional presentation brought the house down with his personal accounts of life as a Royal







how they lead their schools. It gives bursars the opportunity for some outstandingly intensive personal and professional development, networking and investment in personal wellbeing. The chance to see an incredible range of industry suppliers in a short period of time is a real opportunity to challenge working practices and helps give delegates the impetus to move forward with renewed confidence and verve.

Attending the full conference isn't compulsory – even joining for just one day can offer valuable insight into how others are approaching similar challenges, and expose you to different strategies you might not encounter in your usual work environment. ◀●



Marine in the most dangerous and volatile situations and war zones, and how he uses this experience and his resilience to inspire others to reach their full potential.

New to this year's event was the ISBA Advice and Guidance area where VAT 'surgeries' were held for bursars and colleagues to drop in and it also provided an opportunity to put a name to a face, a clever way of fostering additional mutual trust and confidence.

### Next year

Let's face it, nothing is going to get easier in this sector. It can be very difficult for bursars to leave their desks for a few days, especially those who are the only person in the school to stop the wheels falling off, but actually, can schools afford for their bursars NOT to go to conference? The carefully curated conference programme allows bursars to step away from the 'to do' list to focus on themselves and

### Conference 2026

So, we'll see you at ICC Wales on 11-13 May next year where you can connect, learn and be inspired.



For those who attended, the recordings are available to view in the Webinar section of the Reference Library.





# Webinar and event progra

At ISBA, we know how busy school life can be – which is why our professional development (PD) programme is designed with you in mind. Whether you're a bursar, school leader, part of the wider operations team or the school governing body, our training is practical, relevant and built for the real world of independent schools.



**Our PD programme offers you the opportunity to become part of a collaborative member network, where ideas, challenges and practical solutions are shared openly.** From finance, HR and estates to IT, safeguarding, inspections and more, we focus on the topics that matter most. Our webinars, podcasts and in-person events help you stay current, plan ahead and lead with confidence.

## Save the date for our In-person events

### Estates and H&S Conference 2025

#### (in-person)

- 📅 Thursday 25 September 2025
  - 📍 BMA House, Tavistock Square, London WC1H 9JO
  - 📢 We'll notify you as soon as bookings are open.
- Offering breakout sessions on energy procurement, transport management, control of contractors, legionella risk management and energy efficiency strategies, plus keynotes on HSE guidance, sustainability best practice and Martyn's Law, this conference is a must for those managing estates and health and safety in independent schools. Step away from the day-to-day to hear essential updates, gain practical tips to enhance your operations and connect with peers facing similar challenges. Together, we'll explore solutions that help you create a safe, compliant and future-ready school environment.

### ISBA HR Conference (in-person)

- 📅 Thursday 20 November 2025
- 📍 BMA House, Tavistock Square, London WC1H 9JO
- 📢 We'll notify you as soon as bookings are open.

Bringing together HR professionals and those responsible for HR within independent schools, this conference will provide valuable updates in employment, policy and practice, as well as exploring best practice in supporting and managing your school teams. With expert-led sessions tailored to the sector, you'll gain practical strategies to support your work, build valuable peer connections and receive essential guidance to help keep your school compliant, people-focused and future-ready.

This is a must-attend event for anyone passionate about fostering excellence in school HR management. Don't miss the opportunity to connect, learn, and lead with confidence.

### ISBA Finance Conference (in-person)

- 📅 Thursday 5 February 2026
- 📍 BMA House, Tavistock Square, London WC1H 9JO
- 📢 We'll notify you as soon as bookings are open.

Tailored for school finance professionals and those overseeing financial strategy, this conference provides vital updates on the key issues shaping the sector. It's a chance to step away from the day-to-day and hear from experts, explore strategic ways to future-proof your school and connect with peers. Gain sector-specific insights to help ensure your school remains financially resilient, agile and aligned with its long-term goals.



# ISBA – summer term 2025

## ISBA Annual Conference 2026 (in-person)

Monday 11 May – Wednesday 13 May 2026

**Connect. Learn. Be inspired.**

Join us at ICC Wales for three days of sector-leading expert guidance and meaningful networking opportunities in a stunning and accessible location.

Planning is already underway to deliver a thought-provoking programme designed to help you tackle the key challenges of school operations – empowering you to make informed decisions and build a stronger strategic plan.

Nestled in 20 acres of woodland, ICC Wales offers a calm and relaxing setting – ideal for stepping away from your busy school role to take some time for strategic planning. It's just off the M4 and 12 minutes from Newport Station, with a free minibus shuttle, ample parking and excellent on-site facilities.

Reconnect with peers, discover new ideas and take away practical tools to support your role, school or group.

## ISBA / HMC / AGBIS Joint Conference (in-person)

BMA House, Tavistock Square, London WC1H 9JO

12 November 2025

ISBA, HMC and AGBIS will be hosting a joint conference for heads, bursars and governors – a great opportunity for senior leaders and governors to come together to hear from a range of inspirational speakers covering the theme of school leadership and governance and the political and economic challenges facing schools.

## Virtual and audio

Our webinars run each term, covering key operational topics with expert input and practical guidance. As the programme is regularly updated, we recommend checking the CPD section of the ISBA website to see what's coming up.

For insights on the go, tune in to the ISBA podcast, featuring bulletin highlights and guest speakers sharing their perspectives on the latest issues affecting independent schools.

## Want to learn more about leading the operational team within an independent school?

### ISBA So, you want to be a bursar? programme

If you're considering becoming a bursar or want to know more about what it's like to manage the operations team in independent schools, ISBA's *So, you want to be a bursar?* webinar series offers a unique opportunity to explore this rewarding and dynamic career path.

## What to expect

Delivered across four, one-hour webinars, the course offers expert insight into:

- the independent education sector – key facts and context;
- the unique demands of bursar roles across different types and sizes of schools;
- navigating the job search – tips on finding the right bursar role;
- operational realities – from compliance and finance to estates and staffing; and
- Q&A sessions – engage directly with sector experts.

You'll also have the opportunity for a personalised 1:1 guidance session with either **David Woodgate**, ISBA chief executive, **Sue Roxby**, ISBA director of advice and guidance, **Lucy Wyatt**, director ISBA recruitment or **Helen Woods**, ISBA director of professional learning and development.

Open to ISBA members and non-members, this is a valuable stepping stone for anyone seeking to understand and prepare for a bursar role in the independent school sector.

If you are interested in joining our next programme on 2 and 4 September, email the ISBA office team at [isbaoffice@theisba.org.uk](mailto:isbaoffice@theisba.org.uk)

## Did you know...?

ISBA offers a free online programme for newly appointed bursars – which isn't just for bursars!

The ISBA *New appointed bursar's course* is a great tool for succession planning and career development – perfect for an assistant bursar looking to progress, or for someone in a different operational role considering a bursar-style position.

The programme provides a clear and practical overview of all the key areas a bursar or school operations professional will need to get to grips with in their first year in post. Topics include:

- finance and estates management;
- health and safety;
- inspections and compliance;
- the role of the clerk to the governors;
- the single central register and safeguarding; and
- much more.

Delivered over eight interactive online sessions, the programme also includes dedicated time to ask questions and discuss real-life scenarios from your own school.

**Please email [isbaadmin@theisba.org.uk](mailto:isbaadmin@theisba.org.uk) for more details of how to join the programme in the autumn term.** ◀●





# A day in the life

Work can be challenging and stressful for most of us and it's unlikely that we ever get to the end of the 'to do' list each day. Fortunately, no two days are the same and we all develop our own coping mechanisms. *Vanessa Lakatos* is bursar at Gayhurst School in Gerrards Cross, Buckinghamshire. She is bracing herself for the changes in the sector over the coming years, but the supportive ethos at her school where health and family always come first, helps to make her job manageable and there is always the opportunity to have a laugh.

Vanessa Lakatos,  
bursar at Gayhurst  
School in  
Gerrards Cross,  
Buckinghamshire

**How long have you been a bursar?**

More than eight years at two different schools.

**What did you do before you became a bursar?**

I ran my own retail business for 18 years and then spent two years at the Cost Reduction Company (CRC).

**What gives you most job satisfaction?**

Making and keeping a business financially stable and also seeing a project through to successful completion.

**Where do you go for advice?**

ISBA Advice and Guidance, my colleagues on the senior leadership team at Gayhurst School and other consultants or professional advisors depending on the advice needed. Other bursars are also a fabulous source of information.

**What is the most challenging aspect of your job?**

The constant time management needed to juggle the day-to-day tasks as well as trying to squeeze in time for strategic thinking, keeping up-to-date and my CPD.

**How do you get your job out of your hair?**

Walking my dogs and exercising; a good combat workout class really helps with the stress!

**Do you have a team to manage (i.e. FD, HR etc)?**

We have a lovely team at Gayhurst. I manage the admin, finance and premises and am also responsible for catering and IT.





"Taming" the garden is a good stress-reliever

#### What made you apply for a job as a bursar?

When I was working at CRC I was liaising with bursars, helping them to make savings on their expenditure and realised that I already had many of the skills that they needed and that running a school was no different from running any other business. I had already run a successful business for 18 years and although the numbers were smaller, the skills were the same. I mentioned to my children, then aged 13 and 11, that I was thinking about it and they immediately made me go and make the call.

#### Is this your job for life?

Even this time last year I would have said yes, definitely. However, I can see that there will be a lot of changes in the sector over the coming years and I'll be working for a while yet so, who knows?

#### What is your desert island book/film/luxury?

Can I take my dogs? Or any chunky book; I don't mind re-reading the same one!

#### What makes your day shine at work?

There is always something funny that happens every day; both children and adults constantly astound me and there is always the opportunity to have a laugh.

#### What is the most important quality a bursar should have?

Keep calm and keep your head; when there is a crisis it is important to take a few breaths and give yourself time to take the correct action.

#### What is the best bit of professional advice you have been given?

Believe in yourself.

#### What piece of advice would you pass on to a new bursar?

Make contact with other bursars, even if they don't reach out to you. We will always take a call from a fellow bursar and we are a friendly and supportive bunch. It can be a lonely job so do reach out.

#### What is the most important quality in a business leader?

Listening.

#### What time do you start and finish work generally?

I usually arrive around 7.40 and leave either at 5 or 5.30.

#### How do you manage your stress levels, i.e. how do you relax?

Reading, walking, seeing friends and trying (in vain) to tame my wild garden.

#### What do you dislike about your job?

Nothing really – I love the variety. There are things that frustrate me such as trying to manage behaviour change to make the school more sustainable and things I am less keen on like chasing fees or having difficult conversations, but overall I enjoy the challenges.

#### What makes your school so special?

The extremely supportive ethos where health and family always come first, for everyone – adults and children.

#### Who has been the most influential person in your life?

My father. He ran the family

stonemasonry business all his working life and was the most honourable and dependable person I have ever known, both at home and at work.

Make contact with other bursars, even if they don't reach out to you. We will always take a call from a fellow bursar and we are a friendly and supportive bunch. It can be a lonely job so do reach out.

What keeps you awake at night? Nothing relating to my work. If it all went wrong when I was self-employed I could have lost my home. Nothing in my current role is as stressful as that.

#### What keeps you awake at night?

Nothing relating to my work. If it all went wrong when I was self-employed I could have lost my home. Nothing in my current role is as stressful as that.

#### What do you see as your next steps professionally?

I always look for the next challenge – life has a habit of presenting unexpected opportunities so I am paying attention.

#### What question would you like to put to the next bursar in this series of articles?

How do you encourage behaviour change in the school staff – reduce printing, turn the lights off/close the windows etc? I am very interested in any solutions to that. ◀●





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