



# THE ART OF THE BURSAR

An in-depth exploration of how the Bursar's role is changing in UK independent schools and the implications for the sector.

Researched and written by RS Academics  
in partnership with ISBA

**ISBA**

INDEPENDENT  
SCHOOLS' BURSARS  
ASSOCIATION

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# FOREWORD

## At RSAcademics, we know that education matters: it is why we are relentless in our efforts to help schools excel - educationally, strategically and operationally. The business and operational leadership within schools, typically overseen by Bursars, plays a pivotal role in that success.

We are delighted to have commissioned this report in collaboration with the Independent Schools' Bursars Association (ISBA). It represents the most comprehensive examination to date of the Bursar's evolving role in UK independent schools. It reflects what we see in our daily work with school leaders and governing bodies: that the Bursar is not just a financial steward, but a key strategic leader whose influence is integral to a school's direction and viability.

This report sits alongside *The New Art of Headship* and contributes to the growing body of RSAcademics' research into the evolving realities of school leadership. While each focuses on a different role, both reports reflect a shared context: one of increasing strategic challenge, operational pressure and emotional demand.

The research highlights the increasing complexity of the Bursar's remit. From finance and estates to HR, compliance, IT, and even public relations, the modern Bursar navigates a breadth of responsibilities that demand both technical acumen and strategic vision. These challenges are heightened by financial uncertainty, regulatory change, and the growing expectation that Bursars lead as well as manage.



Our findings highlight that this work is not only essential but sadly can also be under-supported. Many Bursars, particularly in smaller schools, are managing immense responsibilities with limited internal infrastructure and external support. Supporting Bursars is a strategic imperative. Their role underpins the effectiveness of Heads and the confidence of governing bodies. Schools that invest in this leadership are more likely to weather change and emerge stronger.

For many years, RSAcademics has supported schools with the recruitment of Bursars and other senior professional leaders. We also work with governing bodies helping to provide strategic clarity and to ensure schools are not only well-led, but built on strong, enduring foundations. The insights in this report, gathered through interviews, surveys and sector consultation, are already shaping our thinking and will inform how we continue to evolve our services in response to the real-world pressures schools face.

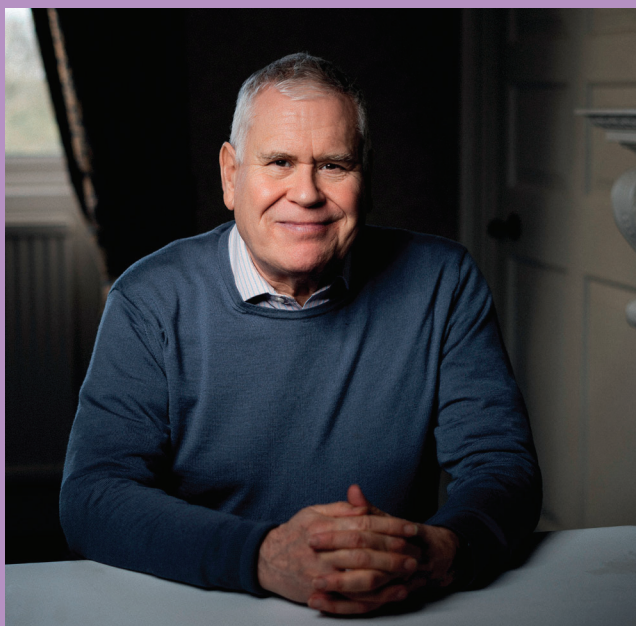
We are grateful to all those who contributed to this study. Their candour and insight give depth and urgency to the findings. My thanks also go to the team at RSAcademics for the depth of their research, the rigour of the analysis and the clarity with which they have presented the findings in this report.

We hope this report provides a basis for meaningful conversations within leadership teams and across the sector. Most importantly, we hope it serves as a catalyst for better understanding, greater collaboration, and sustained investment in those people who, from behind the scenes, help to make independent schools viable and vibrant places to learn.

Bursars deserve to be seen, heard and supported. At RSAcademics, we are committed to ensuring that they are. ■

**HEATHER STYCHE-PATEL**  
CEO, RSACADEMICS

## A note from David Woodgate, Chief Executive of ISBA



**ISBA** | INDEPENDENT  
SCHOOLS' BURSARS  
ASSOCIATION

The role of the Bursar is evolving. As schools navigate an increasingly complex educational and business landscape, the expectations placed on Bursars have never been greater. From financial stewardship and operational management to strategic leadership and stakeholder engagement, today's Bursars must master a broad and demanding skill set.

This is why ISBA has worked with RSAcademics to publish *The Art of the Bursar* – a timely and important report which highlights that the expectations placed on Bursars have never been greater and their impact never more critical.

The report gives voice to Bursars across the country, acknowledging the breadth of their responsibilities and the strategic importance of their work. It examines the expansion of the role in recent years, the skills and experience essential for success as well as looking at how Bursars can best collaborate with heads, governors, and other stakeholders in their schools.

As the largest constituent association within the Independent Schools Council (ISC) with nearly 1300 member schools, ISBA is proud to support this research. Our comprehensive advice and guidance services and our bespoke professional development training enable the Bursars and business managers in our member schools to tackle financial, operational and regulatory challenges with knowledge and confidence. Joining ISBA means Bursars in schools, both big and small, quickly become a valued part of a welcoming and supportive professional community.

The findings of *The Art of the Bursar* report will help inform ISBA's future strategy, ensuring the association continues to adapt and grow to meet the changing needs of its members as it has been doing since 1932.

My thanks go to all the Bursars, COOs, CFOs, finance managers and business directors/managers who shared their experiences openly and constructively to enable the publication of this report. We are pleased to detail the findings with you in the pages that follow, in the knowledge that they will continue to inform the evolution of the profession and the art of the Bursar into the future. ■

# ABOUT THIS REPORT

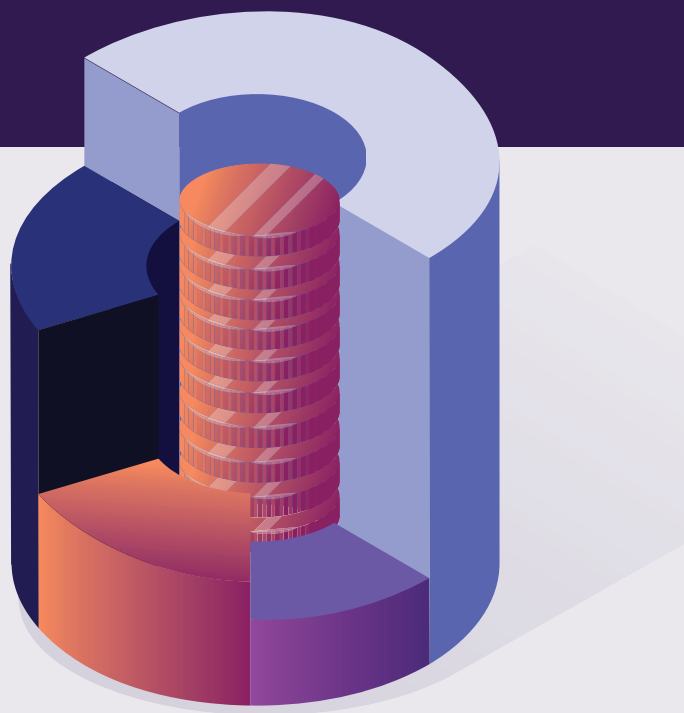
## Purpose and scope

The aim of the research was to explore how the role of the Bursar in UK independent schools has evolved and to identify the key factors that contribute to success. Our goal was to provide a contemporary and evidence-based perspective on this critical leadership position.

The study explored a series of core questions, including:

- What brings the greatest professional satisfaction in the role?
- What are the Bursar's main responsibilities and areas of focus?
- What challenges are most pressing, and how have they changed over time?
- How is the role likely to evolve, and which skills will be increasingly important?
- What knowledge, skills, qualities, and conditions most support success?
- How do school size and type affect the demands of the role?
- What should inform the future development and appointment of Bursars?

Our findings highlight the areas that generated the most discussion among Bursars, Heads, governors, and other sector professionals. The quantitative survey results were analysed to identify consistent patterns and emerging themes, which have shaped a framework outlining the key enablers of success in the role.



## Methodology

The research was conducted using a multi-phase, mixed-methods approach designed to provide both depth and breadth of insight into the role of the Bursar within UK independent schools. The process comprised four key stages: qualitative interviews, group discussions, a large-scale quantitative survey, and the incorporation of expert commentary and case studies. Each phase built upon the findings of the previous, ensuring that the insights captured were robust, well-informed, and reflective of a diverse range of perspectives. A summary of the research coverage can be found in Appendix 1.

## Terminology

Throughout our report we are using the term “Bursar”. Half the respondents to our survey included “Bursar” in their title, and, for convenience, we will use this term to cover a range of other titles such as Director of Finance & Operations, Business Manager, Chief Operating Officer (COO) and Chief Financial and Operating Officer (CFOO). We also recognise that the role often also includes responsibilities as Clerk to the Governors. ■



# EXECUTIVE SUMMARY

**This publication is the latest in the RSAcademics series “The Art of ...”. The report presents the most detailed exploration to date of the evolving role of the Bursar in UK independent schools.**

Commissioned by RSAcademics in partnership with the Independent Schools’ Bursar Association (ISBA), the research draws on over 300 survey responses, alongside in-depth interviews and focus groups with Bursars, Heads, governors, and sector experts.

The findings confirm that the Bursar’s role is undergoing rapid change, becoming broader, more complex, and more strategically influential than ever before.

However, amidst the complexity and pressure, what shines through is the deep sense of purpose, enjoyment and professional pride that many Bursars bring to the role. A role they describe as demanding, but also rewarding, impactful and personally fulfilling. Our aim is to provide evidence-based insights and practical guidance for those appointing, supporting, or working as Bursars.





## A role of expanding scope and strategic influence

Bursars are now pivotal to a school's strategic leadership. No longer confined to finance, they increasingly oversee HR, estates, compliance, IT, operations, and in many cases are also Clerk to the Governors. Almost all Bursars surveyed said their role includes direct involvement in strategic planning.

The knowledge required has expanded significantly, with legal and regulatory understanding increasing most sharply. Strategic thinking emerged as the skill in greatest demand, and resilience and emotional strength was rated both the most important personal quality and the one growing most in significance.

Bursars are increasingly expected to navigate high levels of complexity, influence diverse stakeholder groups, and act with emotional intelligence - all while maintaining operational excellence and long-term strategic focus.

## A varied role shaped by school context

Although the title "Bursar" is widely used, the role differs significantly depending on school size, type, and structure. 22% of respondents work in schools with fewer than 250 pupils, and 8% in schools with fewer than 150. In these settings, Bursars are more likely to carry wide-ranging responsibilities with limited internal infrastructure. While the challenges are shared across the sector, Bursars in smaller schools face particularly acute pressures around workload and isolation.

Despite the variation in context, the research revealed strong commonality across the profession. Regardless of school type, Bursars reported similar challenges and skill demands, underscoring the importance of supporting the role consistently across the sector.



## Adapting to school culture and leading across communities

One of the most distinctive findings is that 90% of Bursars had no experience of working in schools prior to their appointment. This makes the school sector unusual: it is rare for a leadership role in any sector to be filled so frequently by those new to its professional culture. Transitioning into a values-based, relationship-driven environment requires more than operational knowledge.

Adjusting to school life is not always straightforward. Bursars described a steep learning curve, not just around terminology or routines, but in leadership style. Schools operate through consensus, relationships and traditions. Many new Bursars reported having to unlearn leadership structures or fast-paced decision-making norms from previous careers in finance, the military, or business. Bursars must adapt their leadership style to one that emphasises presence, visibility and shared purpose.

The Bursar is unique among school leaders in the diversity and size of the teams they oversee. While Heads typically lead teaching and learning staff, Bursars are responsible for a broad range of functions from finance and HR to catering, cleaning, IT and estates. They must manage people across different pay scales, skillsets, and employment conditions, and do so in a way that fosters shared values and respect.

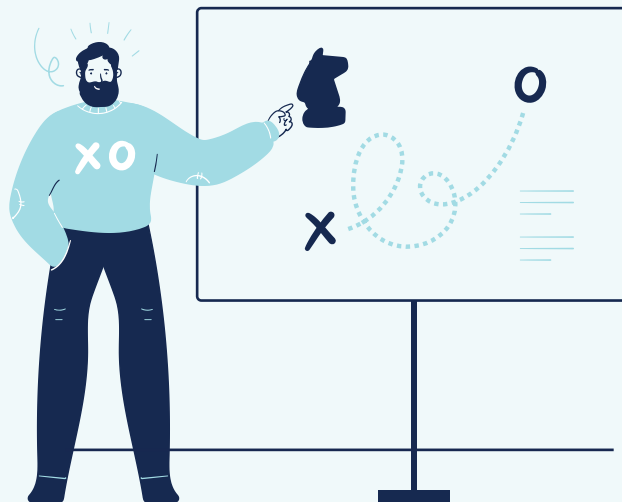
Those who thrive tend to immerse themselves in school life: attending events, learning from academic colleagues, and building trusted relationships. Successful Bursars act as cultural integrators, bridging academic and support staff, and modelling mutual respect across different teams. These behaviours are not incidental to effectiveness; they are central to it.



## Rising pressures and operational complexity

The Bursar's role has become increasingly demanding, marked by both growing scale and heightened complexity. A common concern among Bursars is the struggle to find time for strategic thinking amid the relentless pace of operational responsibilities. Financial pressures remain a dominant theme, with many highlighting the impact of VAT on fees, rising payroll costs, and broader concerns around affordability. At the same time, compliance and regulatory demands continue to escalate, often described as one of the fastest growing and most burdensome areas of the role.

The scope of HR leadership has also expanded significantly, now forming part of the role for 80% of Bursars. This shift brings with it complex employee relations, legal risks, and increased focus on staff wellbeing. Added to this are rising parental expectations, with Bursars frequently managing sensitive issues related to fees, complaints, and communications - often within a more transactional and emotionally charged environment. Together, these challenges create a professional landscape defined by urgency, high volume, and limited margin for error, particularly in smaller schools where resources and capacity are already stretched.



A common concern among Bursars is the struggle to find time for strategic thinking amid the relentless pace of operational responsibilities.

## Strategic leadership in action

Despite these pressures, Bursars are stepping confidently into strategic leadership. Many are driving innovation, diversification, and change - whether through commercial initiatives, digital transformation, or governance reform. The move from operational delivery to strategic thinking is both a response to necessity and a sign of the profession's evolution.

However, carving out the time and space to lead strategically remains a key challenge. The research highlights that strategy often competes with a constant stream of urgent issues, particularly where internal capacity is limited, or leadership expectations are unclear.

Schools that deliberately create the conditions for Bursars to lead - through team structure, governance clarity, and cultural alignment - are best placed to benefit from their strategic capability.



## A nuanced understanding of effectiveness

Our research identifies **five core dimensions** that collectively define effectiveness in the Bursar's role. Each represents an essential lens through which to understand the role, not just in terms of task, but of leadership capacity and professional judgement.

**01 Knowledge:** Technical knowledge remains fundamental. Financial fluency, legal understanding, compliance, HR, and IT competence all underpin credibility and effectiveness. Yet with the growing pace of change and specialisation, what is important is not mastering every detail, but knowing what matters - and where to seek expert advice.

**02 Skills:** Bursars require a distinctive skillset to operate successfully at the crossroads of education, operations, governance, and people leadership. The ability to influence, manage conflict, solve complex problems, and think strategically is key, particularly in high-stakes or emotionally charged situations.

**03 Personal qualities:** Traits such as resilience, humility, tenacity, and clarity of thought emerged as vital. The role can be isolating, pressured, and politically sensitive, often demanding emotional intelligence as much as technical expertise.

**04 Working environment:** Even the most capable Bursar is limited by the conditions in which they work. A supportive governance structure, clarity in leadership relationships, strong operational teams, and aligned strategy are critical contextual enablers. The relationship with the Head and Chair of Governors was consistently cited as a key enabler.

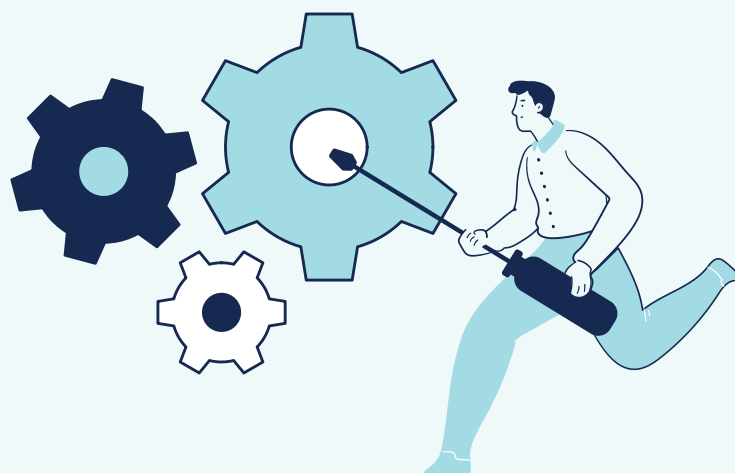
**05 Ways of working:** This final dimension represents the Art in the Art of the Bursar. While knowledge, skills, and personal qualities provide the foundation, it is a Bursar's ability to navigate complexity, lead with nuance, and apply judgement in dynamic environments that distinguishes the most effective professionals. These ways of working are not easily taught. They are refined through experience, reflection, and adaptability. These behaviours are what allow Bursars to stitch together disparate parts of the school, balancing operational delivery with cultural fluency and strategic foresight.



## Co-produced success

A key theme emerging from the research is that effectiveness cannot be achieved in isolation. The most impactful Bursars work within environments where leadership is co-produced: Heads, Chairs of Governors, and professional colleagues share responsibility for creating the conditions for success.

Where Bursars are supported, trusted, and given the mandate to lead - within well-aligned governance and leadership structures - the impact on school performance is tangible. Conversely, even the most capable Bursar will struggle in an unsupportive or unclear environment. Success is not only about the individual, but about the ecosystem around them.



Where Bursars are supported, trusted, and given the mandate to lead, the impact on school performance is tangible.



## Evolving the role: Rethinking responsibilities and structures

There is a growing recognition that the current structure of the Bursar role may not be sustainable, particularly in smaller schools. The breadth of responsibilities, rising legal risk, and need for strategic leadership suggest it is time to rethink how the role is defined and supported.

This may include separating operational and strategic functions, redistributing Clerk duties, investing in middle management, or creating more structured professional development pathways. Futureproofing the role will require new thinking about responsibilities, support structures, and succession planning.

## Implications for appointment, induction and support

The findings of this report highlight a clear imperative: schools must recognise the Bursar not only as an operational leader but as a strategic figure whose success depends on an insightful appointment process, structured induction, ongoing development, and tailored support.

**Appointment processes** should prioritise leadership potential as well as technical competence. While financial literacy remains essential, the ability to influence, adapt, and work effectively within school culture is critical, especially as 90% of Bursars enter the role from outside of schools. Cultural fluency, emotional intelligence, and communication skills are key selection criteria, alongside resilience and the ability to lead across diverse teams.

**Induction** is particularly important for those new to schools. Structured onboarding should go beyond process and compliance to include exposure to the academic life of the school, relationship-building with key stakeholders, and support in understanding governance and school culture.

**Professional development** must be prioritised as expectations grow. Strategic thinking, legal compliance, and people management were all identified as increasingly important areas of expertise, yet many Bursars report limited time and support to develop these areas. Investment in coaching, peer learning, and structured CPD is essential, particularly for those transitioning from other sectors and those in smaller schools.

These actions, taken together, can ensure Bursars are not only operationally effective but strategically enabled, and consequently able to meet the challenges of their role and contribute fully to the long-term success of their schools. When these factors align, Bursars describe their work as not only manageable, but deeply rewarding. Where they are absent, the risks to schools and to the individual are significant.



## In conclusion: A role of depth, challenge, and profound impact

The role of the Bursar has never been more pivotal or more demanding. The Bursar is a critical figure in the leadership of independent schools. Their influence spans operations and strategy, risk and culture, compliance and community. They must balance urgent daily demands with long-term strategic thinking, work across a broad spectrum of disciplines, and lead through uncertainty - often with limited internal support. Our research confirms the importance of supporting Bursars not only in what they do, but in how they lead.

When well-supported, Bursars describe their work as energising and deeply fulfilling. When under-resourced or misunderstood, the risks to individual wellbeing and school performance are significant.

If schools are to thrive in an increasingly complex landscape, they must value, invest in, and enable their Bursars to succeed. The Art of the Bursar offers a roadmap, grounded in evidence, for doing just that. ■

**PART** *one*

# Understanding the role

# Is this the Golden Age of the Bursar?

There has never been a more demanding time to be a school Bursar, but equally, never a more important one.

In an era of mounting financial pressure, increasing complexity, and rising expectations, the role of the Bursar has moved decisively from the back office to the heart of the leadership team. Today's Bursars are strategic partners to Heads, deeply involved in shaping the future of their schools. In many cases, they are the linchpin between a school's vision and its viability, its ambition and its ability to deliver.

This report explores the realities of that shift. Yes, there are growing challenges: escalating financial demands, operational strain, and the weight of constant decision-making. Many Bursars report a lack of understanding among colleagues about the scope and stresses of their role. But behind these concerns lies a clear and consistent message: this is a great job and one that truly matters.

There is a sense of Bursars 'coming into their own', as their work becomes front and centre of a school's strategy, success and, in some cases, even its survival. ■

**“ We hear a lot about the challenges we are all facing and the stress we are under but our work has never been more important. We work closer with Heads than ever before as 'The Number Two' in the school and are more involved in every aspect. There is, therefore, greater recognition of the role of the Bursar in the success of the school, emphasising the critical importance of ISBA, and the team and support around the Bursar. ”**



# The exceptional breadth and diversity of the role



A common theme across all our research is the extraordinary range of responsibilities encompassed within the role of Bursar. While finance may sit at the core, the job routinely spans legal, operational, strategic, and pastoral domains. This sense of scale is not just about technical coverage, but also about switching context rapidly. Bursars often describe a working day that includes strategic planning and hands-on problem-solving. Many described the need to handle complex, high-stakes issues in areas where they have no formal training, but where they are still expected to offer advice and leadership. It is this breadth, as much as the intensity, that defines the modern Bursar role.

**“I am not an accountant, or a builder, or a HR professional, or a caterer, or a housekeeper, or a health and safety expert, or an IT expert, or a cyber security expert, or a safeguarding expert, or a lawyer, or an investment manager, or a banker, or an electrician, or a plumber, or a fire safety expert, or a swimming pool manager. Yet, at different times (and sometimes simultaneously) I am expected to be able to provide sound advice and thinking on all these subjects.”**



## A WIDE RANGE OF SCHOOLS AND SETTINGS

A common question raised during our research was whether it is truly feasible to produce a report on Bursars when their roles can vary so greatly depending on the type of school. Many of those we spoke to noted that the context has a significant impact on the scope and expectations of the Bursar role. Bursars with experience across more than one school type were often the most vocal about the sheer diversity of the job as a consequence of different contexts. Indeed, there are a remarkable range of settings which shape the Bursar's role:

- The size of the school, both in terms of pupil numbers and physical estate.
- The school type: prep, senior, or all-through.
- The composition and expertise of the support staff team.
- The extent of boarding provision, and its 24/7 operational impact.
- The departments reporting into the Bursar: HR, IT, Marketing, Admissions, etc.
- Whether the role is divided into finance, operations, and clerk responsibilities.
- Standalone status versus membership in a group or for-profit structure.
- Oversight of multiple schools, or responsibilities across international sites.
- The stage and scale of commercial enterprise and non-fee income.
- Presence of historic buildings, capital projects or major change initiatives.



**It is this breadth, as much as the intensity, that defines the modern Bursar role.**

**“With the type of school comes the type of role. There is huge diversity in the sector.”**

**“Turnover in schools ranges from £1m to £60m - which present completely different contexts.”**

**“The role varies massively depending on the type of school and structure around the Bursar.”**

Our survey of over 300 Bursars gathered comprehensive information about their schools and professional backgrounds and what is striking is despite the variety of contexts, there was remarkable commonality in the data, insights and trends. Where there are differences, however, we note these throughout. ■

## BEHIND THE TITLE: BURSARS IN PROFILE

Behind the title of Bursar lies a diverse and evolving professional community. Drawing on historical data and bringing it up to date with our latest survey, we see that today's Bursars come from more varied backgrounds, include more women, and bring a broader range of experiences to increasingly complex schools.

### A shifting profile

Historically, a significant proportion of Bursars came from the armed forces, particularly in boarding schools. In 2016, 25% of Bursars came from a military background compared to just 13% in 2025. The proportion from financial services remains high but has also declined slightly (59% in 2016 to 51% in 2025). There has also been a modest increase in those coming from within the education sector itself, now at 10%. But the significant majority enter the Bursar profession from outside of schools, bringing with them varied commercial and operational experience.

One of the most marked shifts in the profession has been in gender representation. In 2010, just 32% of Bursars were women. This has risen steadily over the past 15 years, and Bursars are now equally likely to be a woman or a man.

However, this headline conceals notable disparities by school size. Women are significantly more likely to hold Bursar roles in smaller schools: in schools with fewer than 150 pupils, 72% of Bursars are women, compared to just 45% in schools with more than 700 pupils.

We also observe that a higher proportion of women have a finance background, while longer-serving Bursars and men are more likely to come from military backgrounds.



The data indicates this is a relatively stable profession, with a significant proportion of long serving Bursars.

### From long service to new starters

The data indicates this is a relatively stable profession, with a significant proportion of long serving Bursars. Over the last 10 years, the proportion of Bursars with 10+ years of service has remained around a third. Similarly, the proportion with 3-10 years' tenure has been consistently around 50%. 20% are newer entrants to the profession, which again has been the case for several years. ■

# A typical UK independent school Bursar in 2025



## THE PERSON

### Job title

Bursar

### Sex

Equally likely to be female as male

### Background

Finance

### Experience as a Bursar

3-10 Years

### Number of schools worked

1 or 2 schools

## THEIR ROLE

### School type

All-through day school

### School size

More than 400 pupils

### Location

London or South East

### Charity or for profit school?

Charity

### Part of a school group?

Standalone – not part of a group

### Responsibilities include

Finance, estates and facilities, operations, HR, IT, strategy, Clerk to the Governors



## THEIR VIEWS

### What do they like most about your job?

The variety in the role

### What is their biggest challenge?

Doing the important as well as the urgent

### Which challenge has increased the most?

Financial pressures

### Most important area of knowledge?

Financial knowledge

### Knowledge area that has increased the most in importance

Legal knowledge

### Their most important skill?

Communicating with and influencing a wide range of people

### Skill that has increased the most in importance?

Strategic thinking

### Most important personal quality

Resilience and emotional strength

### Personal quality that has increased the most in importance?

Resilience and emotional strength

### Most important other environmental success factor

High quality support staff team – structure and people

### Environmental factor that has increased the most in importance?

The Bursar/Chair of Governors/Head “triangle” ■

**WHAT MAKES THE ROLE SO REWARDING?**

We asked Bursars to tell us what they find most satisfying and enjoyable about their role. They were given a list of thirteen positive aspects and invited to choose those that provide them with the greatest sense of fulfilment and personal satisfaction.

Despite the diversity of schools, settings and professional backgrounds, the results were strikingly consistent. Across all types of schools, Bursars highlighted similar themes. Although, one key difference did emerge: Bursars working in standalone, not-for-profit schools were more likely to point to working strategically as a core source of enjoyment.

When asked to choose just one aspect that stands above all others, the message was clear: the variety of the role came out on top.

This appreciation for the breadth and depth of the role came through strongly in the open responses to our questions too. Many Bursars spoke about the opportunity to make a real difference, the satisfaction of solving complex problems, and the constant challenge that keeps the job interesting.

**“It’s just a cracking role - huge breadth and depth and it’s so satisfying having an immediate and visible impact.”**

**“Despite the challenges this is the best job in the world.”**

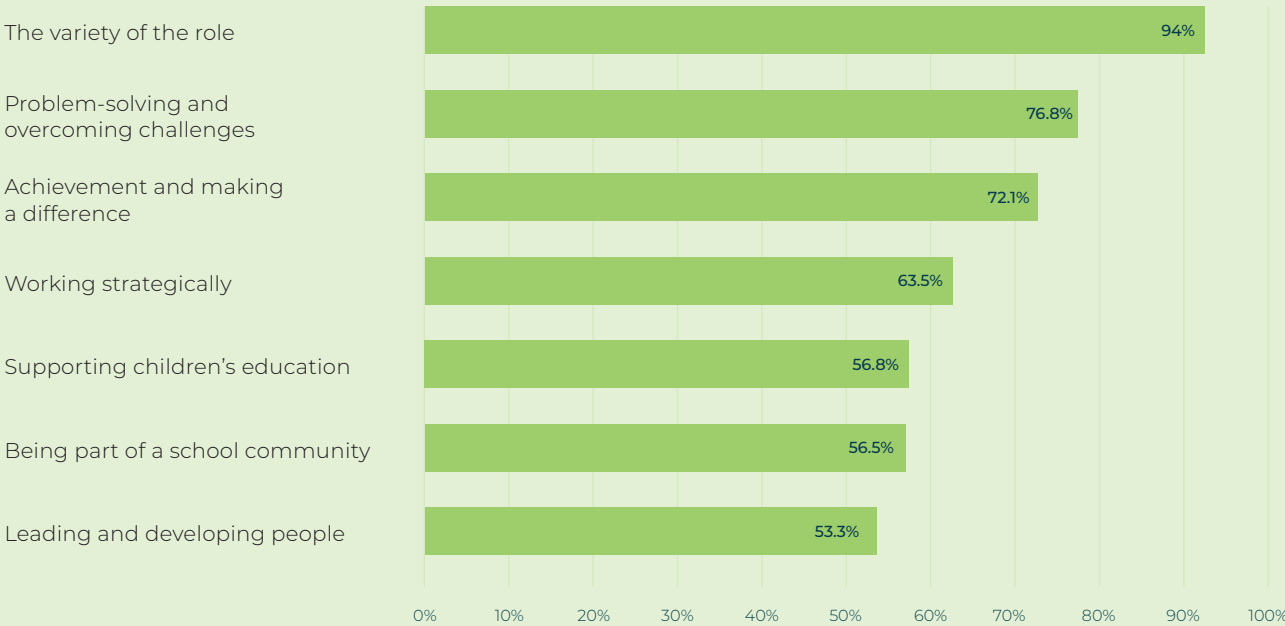
**“You can be unblocking a toilet or negotiating a £3m loan. I love the variety.”**

**“There is never any chance of stagnating. I love the constantly evolving role with the opportunity to learn and get involved in all aspects of school.”**

**“It is deeply rewarding to be able to have an impact on the education and development of young people.”**

Bursars clearly value the scope, complexity, and tangible impact of their work. The job offers the chance to learn, solve problems, contribute to pupils’ educational experiences, and be part of a close-knit school community. Far from routine or monotonous, the role is dynamic, evolving - and deeply rewarding. ■

**Drivers of job satisfaction**



# Crossing sectors: Adapting to school culture

90% of those we surveyed  
had no school background  
when first appointed.



One of the most striking features of the Bursar community is how few had prior experience working in schools before taking on their role. In fact, 90% of those we surveyed had no school background when first appointed. While many Bursars and school leaders accept the lack of prior school experience as typical, it is highly unusual outside of the sector. It is difficult to identify another leadership role in a sector where it is so common for senior appointees to have never worked in the environment they are about to lead.

Adapting to the culture of schools can be a steep learning curve, especially when compared with other sectors such as financial services, professional firms, or the armed forces.

**“I came from an IT start-up corporate environment where change happened extremely quickly. I joined a school - several hundred years old - where things are much more established. It took me a while to tune in to the school and be empathetic towards how it operates.”**

**“Nothing could have prepared me for the breadth of the role.” ■**

## NOT JUST ANOTHER WORKPLACE: SCHOOLS AS COMPLEX COMMUNITIES

Schools are unique professional environments. While they share some characteristics with other not-for-profit organisations or public services, their combination of educational mission, pastoral responsibility, financial complexity and historical legacy makes them distinct. For example, many independent schools are housed in centuries-old buildings, manage significant estates alongside a charitable purpose and some serve as both home and workplace for pupils and staff. They are, in effect, educational communities, businesses, heritage institutions and pastoral environments all at once.

This blend of purpose and structure presents unique challenges - and opportunities - for Bursars, especially when you consider how schools are so different from many of the environments where Bursars are likely to have learnt their skills and established a record of success.

We need to generalise, of course, but comparing a typical Bursar role with say a typical finance role in professional services, some key points of difference were highlighted. The job often combines operational oversight, long-term strategic planning, crisis response, people management, legal responsibility and financial stewardship. Yet all of this is delivered in an environment with deeply embedded traditions and rhythms.

**“You need to get out and about to understand the school, how the boarding works, what the Science Technician does. This is a continual exercise with the Bursar understanding how the school and its environment is changing.”**



**“The glue that holds many businesses together is pay, bonuses and promotions. The drivers in schools are different - job satisfaction, student welfare, vocation. This influences how you manage change and take people with you.”**

**“It was much more full on than I expected and there is a wide scope of must do things on your plate. I had much less time than I expected with an inbox like nothing I had seen.”**

**“One of the many challenges is being mainly responsible for a business which only runs for half of the year, so everything is condensed into term time. All strategic Senior Leadership Team (SLT) and Governor meetings happen at the same time as all the operational mayhem, and Bursars often have to cover anything going on during the holidays.”**

Adaptability is widely recognised in leadership development research as one of the most significant indicators of leadership potential. It goes beyond simply acquiring new knowledge or techniques. Instead, it involves re-evaluating established ways of thinking and unlearning behaviours that may have brought success in different contexts. In leadership terms, it is not just about adding tools to your toolkit but understanding when - and how - to set old tools aside.

For Bursars entering the school environment from other sectors, adaptability is essential. Schools operate within a distinct culture: relationship-driven, values-based, and often more consensus-led than the command structures or commercial frameworks Bursars may be used to. Transitioning successfully into this environment requires more than learning how schools function - it calls for a shift in mindset.

At the same time, Bursars are not only adapting but they are also leading. A growing part of the role involves influencing others within the school community, particularly on the financial and operational realities facing the sector. In many cases, Bursars are at the forefront of helping academic and support staff understand what it means to be a sustainable, mission-driven business. This dual responsibility - adapting and influencing - requires considerable skill, emotional intelligence, and judgement.

## Schools are so different from many of the environments where Bursars are likely to have learnt their skills.

These qualities are increasingly recognised in recruitment decisions. The ability to adapt effectively to a school setting is now considered a key selection criterion when appointing Bursars, particularly those entering from outside the school sector. It is also one of the principal drivers behind ISBA's mentoring programme, which seeks to support new Bursars in navigating this complex transition.

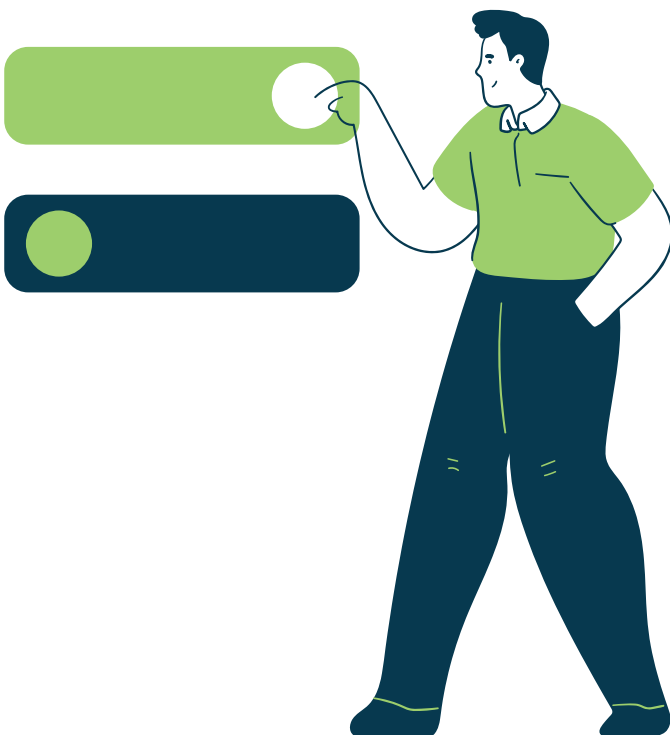
Of course, such transitions are not always seamless. Some Bursars found the adaptation challenging - and a few struggle to make the shift at all.

**“Do they try to do too much too soon?  
Do they come in all guns blazing?”**

**“Where it goes wrong is often because of a lack of understanding about how a school operates, particularly of how much reliance there is on cooperation between staff and departments.”**

**“Some never manage to attune themselves to the academic community and find it very frustrating that they are unable to influence academic staff on the importance of money.”**

However, when it works well, the successful appointment of someone from outside the school sector can bring fresh thinking, broader professional skills and experience of leading in different contexts. This in turn can serve as a constructive counterbalance to embedded norms, helping schools become more adaptable, more sustainable, and more confident in navigating change. ■





## A DIFFERENT KIND OF BOARDROOM

Whilst there are differences between schools, especially those in for-profit groups, at least 80% of the Bursars participating in our research work in schools with a traditional volunteer part-time governing body, which can include ex officio appointments established decades or even hundreds of years ago. Compared to commercial boards, they typically meet less often, especially in terms of formal board meetings, and members spend less time in the business.

**Leadership in the Bursar role is often informal, relational, and subtle, but no less important for that.**

This brings both strengths and constraints. Governors offer valuable external perspective and specialist knowledge. At the same time, whilst there are, of course, differences between schools, Bursars often commented that they found decision making to be slower, more cumbersome and more risk averse than their experience in previous organisations.

More than technical knowledge, the ability to work successfully with a governing body often comes down to soft skills: tact, diplomacy, and political sensitivity. Bursars told us they need to gauge when to advocate firmly and when to step back, when to present issues in detail and when to summarise, and how best to work with individual governors' personalities and interests. These dynamics reinforce a recurring theme across the report: leadership in the Bursar role is often informal, relational, and subtle, but no less important for that. ■

## BECOMING PART OF THE COMMUNITY

Many Bursars told us that one of the most rewarding, and effective, aspects of their role is being genuinely embedded within the school community. This integration goes beyond visibility; it is about participation, relationships, and shared purpose.

Having a child at the school, a personal interest in education, or a passion for a particular aspect of school life can help Bursars connect meaningfully with pupils and staff. Many actively choose to attend school events, get involved with parents' associations, or even contribute to co-curricular activities. For these individuals, the role becomes more than a job, it becomes part of a broader life within the school.

This active engagement not only fosters stronger relationships but also builds goodwill and approachability, both of which are vital in navigating the cultural dynamics between academic and support staff, as well as the wider school community.

**“I strongly believe that this role is more satisfying the more you love the school. It's very much a way of life.”**

**“I think it's important that Bursars and members of their team show their love for the school and see opportunities to become involved in areas of interest. It's a win-win.”**

**“I feel quite strongly that Bursars should be more integrated in schools, running clubs – involvement with pupils is the key. It doesn't feel like extra work, it feels like recharging my batteries.”**

**“An hour on the shop floor is worth a thousand emails.”**

In schools, where culture, values and relationships carry exceptional weight, this kind of visibility and involvement can make a tangible difference. It helps bridge professional divides, fosters a sense of shared purpose, and often contributes directly to a more collaborative, less hierarchical working environment. ■

## BRIDGING TEAMS AND CULTURES

Bursars lead some of the most diverse teams in any school setting. Their responsibilities span managing highly qualified professionals, such as finance, IT or HR specialists, to overseeing teams of part-time, near-minimum wage staff in roles such as catering or cleaning. Theirs is a more diverse team than Heads' and most often quite different from their previous career experience. Bursars, therefore, require more flexibility in how they lead, interact with and motivate their team than in most leadership roles. This complexity is amplified by the breadth of other relationships the Bursar must manage – teaching staff, parents, suppliers and governors. As a result, once again, the importance of adaptability emerges. The ability to adjust communication style and management practices is not just helpful, it is essential.

The range and number of people you have to deal with, people who demand your attention, is different from other jobs in other sectors.

**“You need to be able to talk to an irate parent who cannot believe we have chased them for their outstanding school fees, or deal with complex HR issues with a cross section of employees.”**

**“In the accounting firm, I dealt with clients and graduate colleagues, nowadays I deal with everyone, cleaners, pupils, parents etc. And, in particular, I need to bring people with me.”**

The ability to adjust communication style and management practices is not just helpful, it is essential.



Another recurring theme in our research is a cultural divide, sometimes subtle, sometimes explicit, between academic and support staff. Bursars often find themselves straddling this divide, advocating for support teams while also contributing to whole-school leadership.

Support staff, who typically have different pay structures, working patterns and contractual terms, are sometimes viewed as secondary to the 'core' academic mission. This perception can be exacerbated by terminology, e.g. 'non-teaching staff', and visible differences in conditions such as pensions or holiday entitlements. Of course, this dynamic is not unique to schools, e.g. non-fee earners in professional services, or non-clinicians in health services, but it is an important aspect in schools and is on the minds of several Bursars. Many described the need to model mutual respect, encourage shared understanding, and foster a more inclusive school culture.

**“There are inevitable differences in terms and conditions and some natural tensions. We have found some ways in which we can bridge the divide – such as a joint wellbeing committee, shared INSETs and joint meetings at the start of term welcoming new people.”**

**“How Bursars first understand and then influence the academic community is crucial to their success.”**

**“We’ve chosen to work in schools and there is potential for constant tension between support and academic staff. Our job is to solve problems. If a teacher needs another cupboard, I can’t just say “no”, we don’t have any money in our furniture budget, I have to try to help, be creative.” ■**

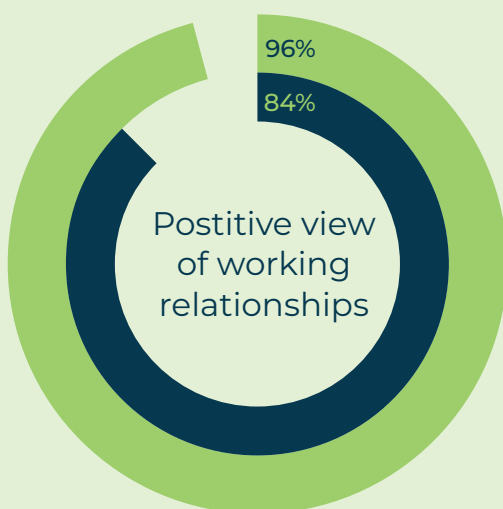
## STAFF SURVEY INSIGHTS: ACADEMIC AND SUPPORT STAFF PERSPECTIVES

**Recent RSAcademics Staff Survey results - covering over 2,500 staff across 21 schools - paint a generally positive picture of working relationships within independent schools. However, they also highlight some important contrasts in how different staff groups perceive their experience.**

A striking majority (92% of all respondents) agreed that there are good working relations between academic and support staff. Notably, this figure has remained unchanged since before the Covid-19 pandemic, suggesting a sustained level of collegiality across roles.

However, when broken down by staff group, a gap in sentiment emerges:

- 96% of academic staff expressed a positive view of working relationships.
- Compared with 84% of support staff.



Academic staff Support staff

This difference reflects disparities in how valued and understood support staff feel within the school community. Several contributing factors were noted:

- Support staff often feel their roles are not fully appreciated by academic colleagues.
- Concerns exist around pay and benefits, particularly pensions.
- Formalised pay structures are less common for support staff, contributing to a sense of inequity.

When asked about other aspects of school life, support staff were typically less positive than academic colleagues about:

- Opportunities for career progression.
- Access to continuing professional development (CPD).
- Scope to contribute new ideas or innovate within their roles.

At the same time, support staff reported higher satisfaction in certain areas:

- A greater ability to manage workloads and meet deadlines.
- More frequent opportunities for collaboration.
- More favourable views of governors and senior leaders.
- A stronger sense that their wellbeing is taken seriously by the school.

These insights reinforce the complexity of staff culture within schools. While overall relations are strong, there remains scope to ensure support staff feel equally valued and understood, particularly as schools seek to build more cohesive, inclusive communities. ■

# A role within a role: Clerk to the Governors



A significant proportion of Bursars - around 65% - also serve as Clerk to the Governors. This rises to around 80% in mid-sized schools with 250 - 400 pupils.

Acting as Clerk involves both procedural and strategic responsibilities. At a minimum, it means preparing meeting agendas, circulating papers, and producing accurate minutes. But it often goes far beyond administration: Bursars frequently take the lead in promoting good governance, ensuring compliance with charity law, supporting strategic planning, and acting as a bridge between school leaders and the Board. This additional workload can consume up to a fifth of a Bursar's time during peak governance periods.

**“Leading up to the submission of papers I could spend all day, for several days, on governing body work.”**

**“The Clerk to the Governors is a different set of skills.”**

## Wearing two hats: Leading governance as Bursar and Clerk

### Homera Najib, Bursar and Clerk to the Governors at Bradford Grammar School (BGS)

#### GOVERNANCE AT BGS

We have 18 governors, including four ex officio members and a pretty typical structure. Perhaps less typical is the Compliance Committee, which I don't attend as they monitor the area that I'm responsible for. We hold 24 scheduled meetings a year, plus ad hoc ones as needed. In this way we can be nimble with decision making, despite a rigid schedule.

#### WHAT WORKS WELL?

##### Working with the Chair

I think the key pillar is my relationship with the Chair of Governors. Everything I do is done in partnership with her and understanding how you best work together is the prerequisite to everything else.

##### Annual review

We collect feedback from governors and review how well the governing body and the committees are working. Do we have the right people in the right roles? Is the structure still fit for purpose? We look at our mix of skills and plan any required succession.

##### Induction

During the pandemic we couldn't run induction in the same way, and we realised the importance of induction. We have a comprehensive list of documents and run an induction session at the school and hold follow-up meetings to check-in periodically.

##### Training

Our governing body found the "Good Governance Training" from AGBIS and HMC very useful. The Board agreed which modules should be compulsory for which governors and which were optional. The take up was good and, in particular, we followed up by discussing at each committee what we learnt and wanted to change as a result.

##### Working groups

Governors have created working groups to help manage major changes and projects at the school. The Clerk can play a key role in establishing the working groups,

drafting the terms of reference and then ensuring that the correct governance processes are followed regarding key decisions. A good example was expanding the Junior School to include Reception and Year 1. This was discussed at a governors strategy day and then led by the working group over two years - from the building of a new facility to developing the curriculum, recruiting staff, marketing etc. This approach has been very successful.

##### Balancing value and bureaucracy

This is at the heart of good governance. Governors need to ask for the level of detail they require rather than the level they might find interesting, and the SLT need to be open, transparent and clear in how they present information to encourage this. As Clerk, I play my part in getting this balance right, but the Chair also plays a key role to manage and direct her team of governors.

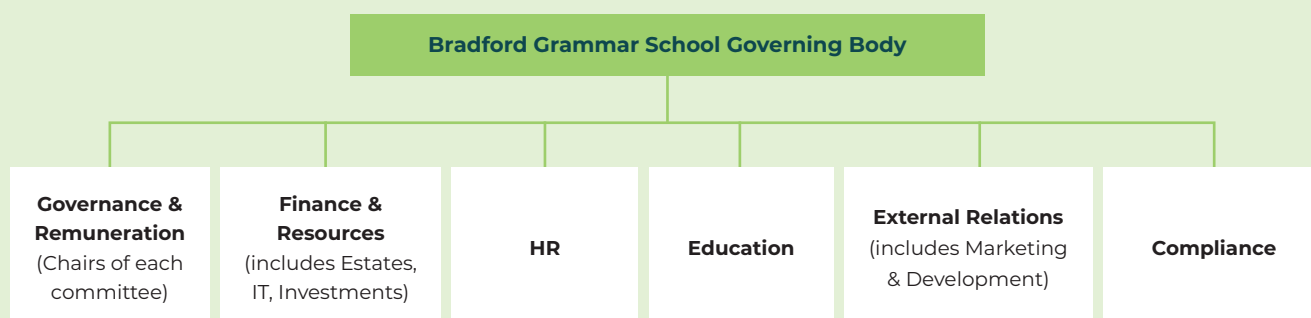
##### Balancing dual roles as Bursar and Clerk

I try to make sure that I only do those parts of the Clerk role where I can add most value. I see it in three main parts:

- 01 Admin** is delegated to a colleague.
- 02 Minutes:** of meetings are taken by a professional clerking company who provide the same individual for each meeting.
- 03** What I call '**clerking**' is the rest of the role and where I focus my attention. This includes working with the Chair to promote good governance, building relationships and trust with the governors, and of course, facilitating the vitally important interaction with the Head and SLT.

##### Learning to 'clerk'

I think I learnt most from my own role as Vice-Chair of a Multi Academy Trust and attending training for aspiring Chairs. Like any role, I have developed as Clerk during my time in post and as my understanding of good governance practices has deepened. ■



**PART** *two*

# Managing Complexity



# Expanding responsibilities, rising expectations





Two defining themes emerge from Bursars' reflections on the role today: the breadth of responsibility and the shifting external environment in which schools operate. These are not new challenges - but they have deepened, diversified, and intensified.

When asked to identify the greatest pressures and to identify which had increased the most, Bursars consistently pointed to two areas of significant change:

- 01 The rising cost base and pressure on income.
- 02 The complexity of regulation and compliance.

These forces converge to create a workload that is both intense and unpredictable. Bursars face a constant stream of pressing issues, often without the resource or time to resolve them in a structured way.

They describe managing an ever-growing volume of work, compounded by increasing complexity, regulation, and risk. Alongside this sits a growing need to develop commercial strategies, generate non-fee income, and guide schools through change in response to unprecedented financial pressures.

Societal shifts also play a role. Parents and staff are more vocal, more legally aware, and often more demanding. This has increased the number and intensity of sensitive matters requiring careful and confident handling.

In summary, Bursars told us: there is more change, more to do, more complexity, and they need to try new approaches to deal with new problems.

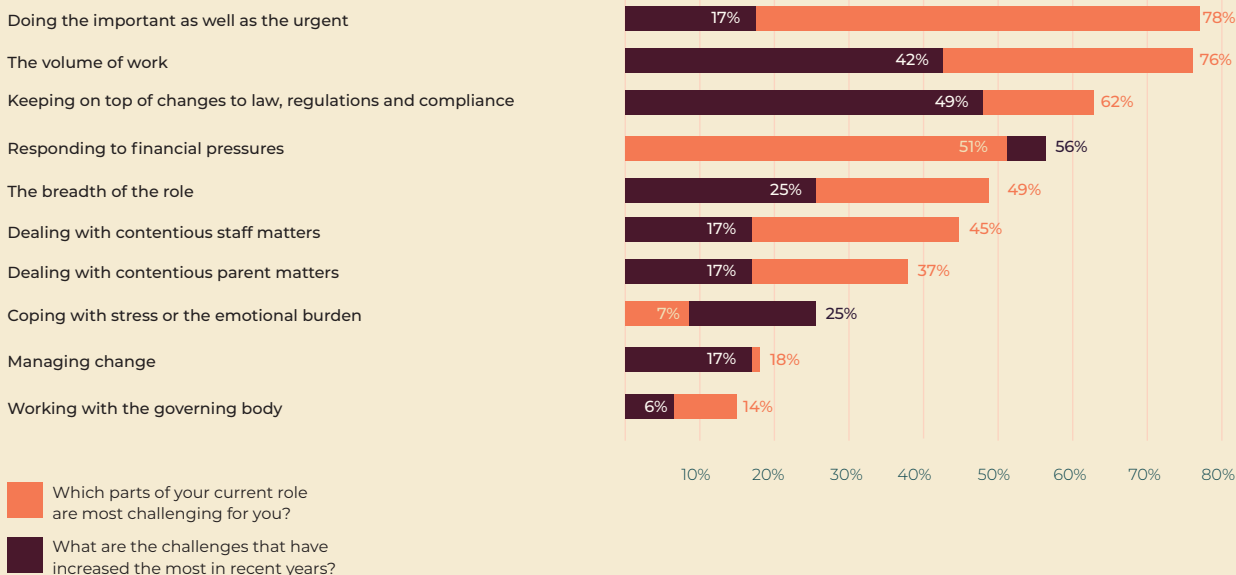
**“There is no normal anymore! Each year there has been either Covid or Teachers' Pension Scheme (TPS) or cost of living crisis or VAT. This is the job now - you need to be resourceful and resilient.”**

**“In the nine years I have been a Bursar, the pace of change has increased markedly. Compliance aspects are much more time consuming.”**

**“Over the years the levels of complexity, regulation and financial pressure has increasingly made this a role not for the faint hearted.” ■**

## TOP 10 CHALLENGES

Top 10 aspects selected as 'most challenging', and the challenges that have 'increased the most' in recent years



## RESPONDING TO UNPRECEDENTED FINANCIAL PRESSURES

Unprecedented financial pressures have become the most significant and fast-growing challenge for schools in recent years. This financial pressure underpins a broader shift in how Bursars must operate: driving the need for more strategic leadership, innovation in generating non-fee income, and greater engagement with colleagues across the school to build understanding of financial sustainability.

These pressures were often described as “the perfect storm” or a “quadruple whammy” with:

- 01 TPS cost increases.
- 02 Changes to business rates relief.
- 03 National Insurance employer contributions rate increases and the drop in threshold.
- 04 VAT.

This comes in the context of cumulative pressures faced by schools in recent years. The financial impact of Covid, including frozen or reduced fee income and additional infrastructure costs, has been followed by sustained inflation affecting energy, food and services. Rising salary expectations, driven by inflation and staff shortages, add further strain. While many families are finding independent education less affordable due to reduced real earnings. These challenges are compounded by a declining birth rate and early signs of waning interest from overseas students.

**“There has been a constant stream of fresh and time-consuming challenges from starting in the role. These have included significant TPS cost increases, Everyone's Invited, Covid, cost of living crisis, European wars, change in government (with loss of business rates relief and implementation of VAT). All these have impacted either on parent affordability and/or reputation of the sector.”**

**“VAT on fees has unequivocally been the biggest challenge to all schools.”**

## Spreading the word about financial realities

At the same time, Bursars recognise that it has never been more important to educate and influence colleagues in the financial realities facing many schools. Different schools may be at different stages, but for all Bursars this seems to be an important part of working in a school and something that may be very different from where they worked previously.

Many Bursars commented on how attitudes towards the commercial realities are changing. In today's climate, especially with the independent sector under public and political scrutiny, staff are more open than before to understanding how schools operate as businesses with charitable aims.

Yet this awareness is not automatic. It often requires deliberate, well-timed education from the Bursar, supported by the Head and governors. That makes it all the more important for Bursars to understand the school's culture and values - so they can tailor their messages in a way that resonates with their audience. Many described how they shifted their approach over time: moving away from trying to 'win the argument' towards nurturing shared understanding, sometimes through small acts of trust-building. Bursars who approach this work collaboratively, with clarity and empathy, are most successful.

**“It was a bit of a shock when I was told 'you need to understand what it's like to work in a prep school and that we are not a business' – I thought well yes, we are!”**

**“Nowadays, there is a greater need than ever for Heads and Bursars to help staff gain a greater appreciation of financial realities. Where we get our money from and how it is spent – the choices we need to make. It hasn't been part of discussions enough in the past.”**

**“We started our pension discussions with a big education piece. This was crucial in helping us reach a happy conclusion.” ■**

## VAT: A CATALYST FOR MORE OPERATIONAL COMPLEXITY

While much of the public debate around VAT has focused on affordability and its impact on parental perceptions, Bursars were clear that the most immediate and underestimated consequence is the impact on workload, capacity and operational planning, particularly given the speed of implementation.

**“The burden of learning and administering VAT is immense and all consuming.”**

Far from being a standalone issue, VAT intersects with nearly every area of school operations. It affects fee structures, wraparound care, international programmes, capital projects, staffing models, and even fundraising. It also increases the need for legal advice, accounting input, and staff training. All of which add pressure to already stretched support teams.

**“Undoubtedly VAT on fees and other political changes have made the role far harder and much more stressful.”**



**Bursars were clear that the most immediate and underestimated consequence is the impact on workload, capacity and operational planning.**



Some schools have already begun restructuring their internal teams or bringing in temporary support to manage the additional workload. Others warned that the full cost and complexity of managing VAT within the wider compliance landscape is still not fully understood - particularly in smaller schools, where capacity is already limited.

VAT, then, is not just a technical or political issue, it is a system-wide operational challenge. ■

## COMPLIANCE AND REGULATION: AN ESCALATING BURDEN

Bursars consistently identified regulation and compliance as one of the most significant and fast-growing pressures in the role; second only to financial challenges. It is also the area of required knowledge that Bursars say has increased the most in importance and, given the level of change and complexity, where many Bursars feel least confident.

This is not simply about understanding rules; it involves interpreting what is required, translating this for colleagues, ensuring compliance, and often carrying the ultimate responsibility for risk. Many Bursars feel the burden is becoming unmanageable, especially in smaller schools where one person may be responsible for HR, finance, legal, facilities and compliance, often without dedicated support.

**“The expectation is that the Bursar is able to read/digest regulations/compliance areas then summarise and feedback what is required.”**

**“Volume of work has changed due to constant emails in need of attention and keeping up with laws and compliance. There are far more processes and policies in place than ever before.”**

**“I am an Independent Schools Inspectorate inspector and therefore understand the system better than most but it still scares me something rotten! The devil is in the detail and understanding what one needs to do is harder than actually doing it. Very stressy!”**

**“Working in a small school where the Bursar role covers so many huge aspects of a business it can be overwhelming. Keeping on top of legislation, e.g. employment law can take a lot of time, and we won’t even mention VAT.”**

The legal and regulatory environment facing schools has changed significantly in recent years - both in volume and complexity. Bursars report that almost every aspect of their role is now affected by new or evolving requirements, ranging from data protection and safeguarding to contracts, health and safety, and inspection readiness.

This increase has not only raised the operational demands of the role but also introduced new levels of risk, stress, and reliance on external legal advice. Many schools have responded by investing in dedicated in-house support, either through recruitment or consultancy.

**“Over the last eight years we have had continuous increases in compliance and regulation. Almost every aspect of the role is impacted by new and changing regulations.”**

**“We have added a full-time member of staff to handle compliance.”**

**“A great burden of being in charge of everything is the legal risk of getting things wrong without spending a lot on legal advice.”**

In short, regulatory compliance is no longer a side responsibility; it is a core component of the Bursar’s role.



## How the legal and regulatory landscape is changing for Bursars

Paul Jones, Partner at Farrer & Co

### In what ways have legal and regulatory matters become more complex for Bursars?

There is no avoiding the fact there is more law for Bursars to be aware of, covering more aspects of the school and its business-as-usual (and non-BAU) activities. This includes detailed procedural, reporting, record keeping and inspection requirements – which in combination go to a school's overriding reputation and therefore increasingly inform the school's risk register. A good example is the area of safeguarding.

Bursars need to deal with different regulatory authorities who may take different approaches, impose different standards or require different information. A serious safeguarding incident, for example, as well as involving the Local Authority Designated Officer (LADO), may require reporting to the Charity Commission and in turn might register with the inspecting authorities and in turn have implications with UK Visas and Immigration (UKVI). Many areas of the school's operation are so multi-faceted nowadays, there is a greater requirement for a holistic overview and management, hence the gradual rise of dedicated 'compliance officers' within schools.

This multi-faceted nature of regulations can also mean that different areas of the law overlap or even contradict each other. A school parent contract, for example, should ideally not 'over-prescribe' what will happen in certain circumstances to allow these overlapping regimes, if they need to take priority, to be implemented without unintended consequences. Managing a safeguarding incident is, again, a good example of where this might happen. Data protection is another. Privacy rights of children and their parents may not always align and, as the child gets older, could shift; and, in the context of a serious safeguarding incident may or may not be overridden completely.

The number of contentious matters that Bursars have to help deal with has increased significantly.

Parents and staff expectations have changed. They are, in general, much more aware of and willing to assert their rights and raise matters formally, including litigation.

With some areas of the law, it is clear what you need to do to comply, but other areas are more complex requiring judgement between competing rights or the need to interpret principles. The whole area of data protection, using that as the example again, is expressed in terms of principles which organisations need to apply to their context. You might say the same, to some extent, in relation to aspects of Keeping Children Safe in Education (KCSIE).

Parents and staff expectations have changed. They are, in general, much more aware of and willing to assert their rights and raise matters formally, including litigation. The number of contentious matters (including formal complaints) that Bursars have to help deal with has increased significantly, as have the number of routes that complainants can take and indeed the tactics they adopt. The making of a 'data subject access request' (or DSAR) is now one of the most common 'reactions' from parents and staff to matters going against them, for example. The need also for thorough investigations, which could be staff or pupil related, is another example where Bursars can become involved as a result of incidents.

More and larger risks, in particular, mean greater exposure to potential risks, notably financial and reputational, if you fall foul of the legal requirements or are not seen to react and deal with an incident properly.

### How might we quantify the level of change or increase in complexity?

Perhaps one indication is the number of policies schools now need to develop, communicate, monitor and review. I would estimate a typical school now administers more than double the policies it had, say, 10 years ago. Another illustration is the number of schools which have appointed Compliance Officers or in-house lawyers.

### Which areas have changed most in recent years?

**UK Visas and Immigration** - The school's role as a student sponsor is much more controlled than before and is linked to the inspection regime. If you fail the inspection on even quite minor grounds you risk losing your ability to sponsor international students – including those already at your school.

**Safeguarding** - The most significant change dates back to 2014 with the introduction of KCSIE with detailed guidance which became part of ISI standards. This is the single biggest regulatory change affecting every aspect of a school's operation. It is updated most years.

**Charity law** - Apart from the reporting requirements on reputational matters mentioned above, the underlying law itself hasn't changed particularly in recent years (despite challenges in the past to, e.g. public benefit). Schools which are charities, however, have become much more aware of their obligations, especially in the context of ensuring 'best-practice' when it comes to governance.

## The big change was in 2018 when data protection regulations were harmonised with Europe.

**GDPR** - The big change was in 2018 when data protection regulations were harmonised with Europe. Schools hold a lot of personal data so this was a major change in needing to demonstrate adherence to the principles set out in the new regulations. Subject Access Requests were a new right which need careful management and have increased along with the number of contentious or escalating cases mentioned earlier.

**Employment law** - Although the Equality Act dates back to 2010, several aspects have continued to develop through case law and additional regulations, for example, in relation to protected characteristics and the need for reasonable adjustments.

And, of course, I haven't yet mentioned VAT!

### Have we reached peak regulation?

You would like to think we might have done as there is not much left to regulate that isn't covered already. However, there are some potential developing areas and, of course, there will be changes with the new government:

- What will the impending changes to employment law being introduced by the new government mean in practice for schools?
- Will schools be regulated in the same way as other sectors when it comes to money laundering?
- What are the implications for school sport of the rising awareness of the impact of head injuries and the precautions and risk mitigations against them?
- And then there is AI. As AI-enabled technology develops there will be use-cases made in and for schools and the teaching of pupils (in fact, there already are). Whilst it may not be an area heavily regulated per se by external regulators (which is the current position of the UK government), it will need careful introduction and monitoring, not least from a safeguarding and data protection point of view. It will also need to align with more general compliance under the Online Safety Act and future developments in terms of online safety of children. ■



## HR: A GROWING BURDEN WITH HIGH STAKES

80% of the Bursars in our research have responsibility for Human Resources (HR). HR is increasingly cited as one of the most challenging and time-consuming areas of the Bursar role. From performance management and restructuring to contracts, safeguarding and wellbeing, HR matters are becoming more sensitive and legally complex.

When discussing the challenges of leading the HR function and dealing with staff matters, the emerging themes include:

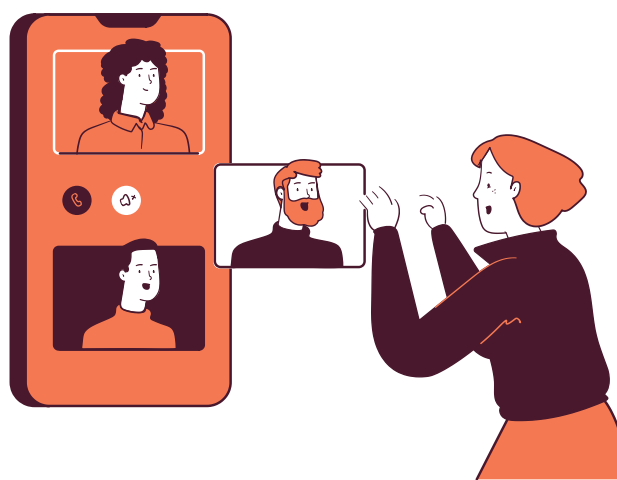
- **Professionalisation of HR:** Over many years, there has been a professionalisation of HR within schools with the appointment of HR Managers/Directors, the development of more HR policies and procedures, improvement of people management and development and training of line managers. This includes a need generally to operate more formally and transparently with any employment relationship – not just doing the right thing but being able to show that you did so.
- **Changing staff expectations:** Staff expectations have changed, along with changes in society, with greater demands for flexibility and needs around wellbeing. Staff are more aware of their rights and more willing to assert these. There are more contentious issues, including formal complaints such as grievances or even litigation.
- **Employment law expansion and complexity:** There have been significant developments in employment law and other areas of law that effect employees such as General Data Protection Regulation (GDPR) and regulations such as safer recruitment.
- **The complexity of employee cases:** Changes in law and expectations lead to much more complexity and time required in the handling of individual employee cases which are often a combination of several different factors.
- **Change and consultation:** Schools have led major changes to organisation structures, such as mergers or redundancies, and to terms and conditions such as TPS. These have required extensive consultation and, for the first time for many schools, led to collective action such as requests for union recognition or even industrial action.
- **Staff shortages:** There are challenges recruiting staff given financial pressures and skill shortages.

**“Staff attitudes to their work have changed massively in the last 10 years.”**

**“Dealing with staff is becoming more complicated. People are more mentally fragile, or at least presenting as such.”**

**“There has been an exponential increase in time spent on staffing issues, primarily around expectations of work/life balance.”**

**“It is very hard at the moment to find good staff, especially support staff.”**



### Handling difficult conversations

A common thread across Bursars' comments was the skill and emotional intelligence required to manage difficult conversations, which are both increasingly more frequent and complex. This might involve giving unwelcome feedback, handling complaints, or navigating the fallout from complex staff dynamics.

**“We all must have difficult conversations with staff and we mustn't duck them. When you have a difficult conversation be clear and be very lovely, but don't duck the issue.”**

**“Empathy - thinking about where people are coming from, what matters to them, putting yourself in their shoes.”**

**“With the Head being in the TPS, the Bursar needed to take the lead in the consultations along with a Governor and the Director of HR.”**

What emerges is a clear picture that while policy and process are important, what Bursars are increasingly managing is the emotional complexity of people at work.



## How Legal Complexity Is Shaping the Bursar's HR Role

Kristine Scott and Oliver Daniels, Partners in HCR Law's Education Team

### How has your work advising schools on HR matters changed in recent years?

The areas we are involved with and the type of advice needed have changed significantly, for example:

- **Managing substantial workplace changes:** Schools are increasingly undertaking complex workforce change processes to reduce costs and improve efficiency, including restructures, redundancies and pension changes. These require specialist legal advice, strategic project management, and frequently involve complex collective consultation. Bursars typically lead on the business case and staff consultation, meaning their involvement in strategic workforce change is deeper than ever.
- **PR and communications:** Reputational risk has become a key concern when navigating complex or contentious processes. Our support often involves preparing communications for staff and, where appropriate, other stakeholders such as parents, pupils and the media. The school context can make these processes more drawn out and sensitive. Consultations relating to TPS, for example, can be particularly emotive and have triggered industrial action in some cases. Social media means that it is much harder to control your message and manage reputational risk. For charitable schools, there may be an obligation to report an issue that may impact the school's reputation to the Charity Commission. Although the decision as to whether to make such a report sits with the trustees/governors, the obligation to consider making such a report often arises first with the Bursar and requires consideration of all the relevant regulators. We have seen an increase in the number of such reports made in recent years.
- **Multi-faceted case management:** Developments in the law, changes in society and employee expectations have led to much greater complexity in handling individual employee relations matters. Staffing issues are, increasingly, multi-faceted requiring legal advice across a range of different specialisms. For example, in the case of alleged misconduct:
  - Safeguarding obligations may require liaison with the Local Authority or Police
  - Interrelated grievances may emerge
  - Data subject access requests may arise
  - The employee may be off sick and unavailable for meetings
  - Parents or pupils may be involved
  - There may be reputational risks to manage.

A single disciplinary issue can quickly escalate into a multi-dimensional challenge requiring legal, procedural and communication expertise.

- **Trade Unions:** Union engagement has grown, particularly due to TPS consultations, with some schools facing recognition requests or industrial action, which was previously rare in the sector. The NEU states on its website that over 200 independent schools now recognise them for collective bargaining. We advise schools on managing these requests and minimising risk. Many Bursars have little prior experience in this area.
- **Employment law changes:** Over the years there have been significant changes in the law that have had a specific impact on the sector, for example holiday pay arrangements. With the new Employment Rights Bill progressing through Parliament, we are helping Bursars interpret these changes and prepare schools accordingly.

### What skills are increasingly important for Bursars to successfully manage HR?

In addition to strong communication and people skills, Bursars must have the emotional resilience to handle lengthy, often contentious processes. Even where decisions are Board-led, Bursars are often on the front line of implementation and fallout.

They must be practical and adaptable - Trade Union engagement is a good example of a challenge that emerged quickly across the sector. Good judgement is essential, particularly in assessing risk across finance, employment, reputation, and operations. Bursars must also recognise when to seek support, work collaboratively, and draw on internal and external expertise.

Above all, Bursars need the ability to stay calm under pressure. Don't panic, and don't take things personally. The ability to stay measured is key. ■

**In addition to strong communication and people skills, Bursars must have the emotional resilience to handle lengthy, often contentious processes.**

## **RISING PARENTAL EXPECTATIONS AND INCREASED DEMANDS**

Nearly 40% of Bursars identified managing relationships with parents as a significant and growing challenge. While some longer-serving Bursars may see this as less of a concern, the trend is more acute in larger schools.

Typically, Bursars encounter parents when something has gone wrong. Whether it is unpaid fees, dissatisfaction with school services, or logistical concerns such as transport or catering, the interactions are often emotionally charged and require careful handling.

**“Bursars need good client relationship skills – for example when dealing with fee increases. They need to be firm but good at handling conflict.”**

**“Typically, a Bursar deals with parents when they are unhappy.”**

**“It’s very difficult dealing with parents who are at the end of their tether. It can be quite a harrowing situation.”**

While the majority of parental interactions are positive, many Bursars report a marked shift in parental attitudes and behaviours, reflecting broader societal changes. These include:

- Greater awareness of rights and a readiness to assert them through formal complaints, GDPR requests or even legal action.
- Heightened focus on value for money, with families making considerable sacrifices to afford fees.
- Less deference to school leadership, and more questioning of school decisions.
- Higher demands for timely, detailed information.
- The amplifying effect of social media, which can escalate issues quickly and beyond the school's direct control.



**“Parents are more questioning and demanding across all elements of the school.”**

**“Parents are increasingly demanding for value for money and can be more difficult to deal with these days.”**

**“Parents are more challenging and less deferential. They may treat the school as a luxury consumer service and are much more aware of their rights as a customer.”**

To counterbalance some of these challenges, Bursars and school leaders are placing greater emphasis on proactive engagement and relationship-building with parents. Social events and informal interactions are proving valuable in improving goodwill and reducing conflict.

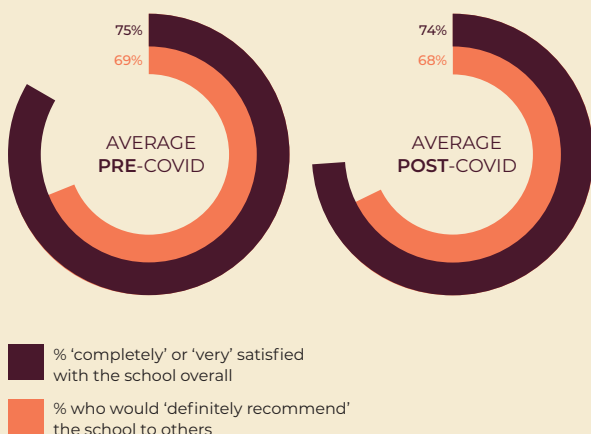
**“We involve parents in many more social events to build relationships and get them onside – golf days, art galleries, dog walks, fitness in the park after drop-off. It helps fundraising and it helps relationships. Social events for parents mean happier parents.”**

Finally, the scope of what parents expect schools to deliver continues to expand. Beyond academic outcomes and pastoral care, schools are increasingly expected to provide wrap-around childcare, moral and character education, and proactive engagement with issues such as online safety, social media, and societal topics like misogyny. ■

## WHAT CAN WE LEARN FROM RSACADEMICS PARENT SURVEYS?

Analysis of more than 250 surveys involving over 60,000 parents shows that overall satisfaction with their school remains high. Although, for senior schools we are seeing a trend in declining satisfaction and advocacy levels.

### Prep/Junior Schools

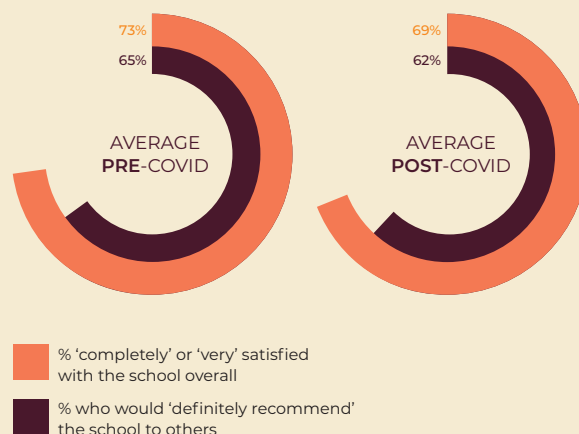


Our analysis shows there has been a decline in parent satisfaction specifically relating to pupil behaviour and also communication with teachers and tutors. At the same time, some parents are becoming more transactional in their mindset, increasingly focused on the value they believe the school should deliver. This perceived value varies widely between families and may include academic excellence, exam outcomes, senior school or university destinations, a well-rounded educational experience, the school's facilities, or the extent to which their child is known and treated as an individual.

A small but significant number of parents are becoming more vocal and assertive, expecting higher levels of communication about their child's progress and school life, and in some cases seeking more influence over school decisions and direction.

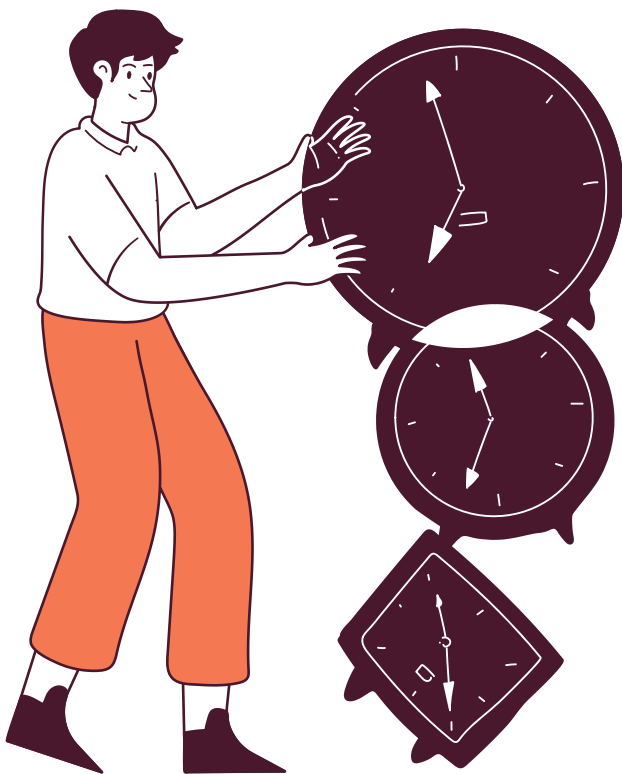
Affordability is another growing concern, even among families in traditionally affluent areas. Many parents are reviewing the long-term cost of independent education more carefully and seeking assurance that it represents a worthwhile investment.

### Senior Schools



Some parents are becoming more transactional in their mindset, increasingly focused on the value they believe the school should deliver.

# Volume, urgency and pressure



For many Bursars, the most consistent and pressing challenge in day-to-day life is finding time to focus on strategic thinking, planning and long-term development, while managing a continuous flow of urgent operational demands, i.e. doing the important as well as the urgent. This was identified as the single greatest challenge by Bursars across all types of school and levels of experience. While the ambition is clear, the daily demands of the role often push strategic thinking to the margins.

This is not a new issue. In the last members' survey we ran for ISBA in 2021, we found that:

- Almost **two-thirds** of Bursars felt they spent **too little time** on strategic activities.
- Over **three-quarters** said they spent **too much time** on unplanned duties.

As one Bursar put it,

**“I personally need to spend more time on strategy and transformation and leave my team to deal with the day-to-day issues.”**

The underlying challenge is not just volume, it is the constant tension between leadership and delivery, thinking and reacting. There seems to be a universal feeling amongst Bursars that they should be doing more planning, strategic thinking, networking, developing staff, learning etc. but that they struggle to do so in practice. This has long been the case but many see it as an increasing challenge. ■

## WHY IS THIS SO DIFFICULT?

### Overload and operational pressures

Many Bursars described being overwhelmed by the sheer volume of day-to-day operational matters. Time and energy are consumed by responding to issues, supporting others, and firefighting. Bursars feel they are pulled in many directions, often balancing critical infrastructure and compliance issues with leadership at the cost of strategic work.

**“You only get to start your real job when everyone’s gone home! During the day, you are sorting out everyone else’s problems. There is a terrific amount of noise in a Bursar’s world, phone calls, requests, meetings.”**

**“I spend too much time in the business and not enough time on the business.”**

**“Strategy, especially in smaller schools, is very difficult to carve out the time to focus on. The caretaker is out driving the minibus, so you have to be there to open the school. At the same time, you need to deal with a H&S matter, the payroll needs signing off, and you need to prepare papers for the F&GPC.”**

**“Prioritising is always the biggest challenge. For example, one early evening last term I was writing the strategic plan, only to get called because a toilet was overflowing and I was the only person left on site other than a porter. He and I then literally rolled up our sleeves, got the spanners out and cleared the blockage to stop the flooding. Then back to the strategic plan (having washed my hands...)”**

### Everything comes to the Bursar

The visibility and accessibility of the Bursar often lead to everything being routed through them, whether or not they are the best person to respond. We also observe that there is often a cultural expectation that the Bursar is always available and always ready to act.

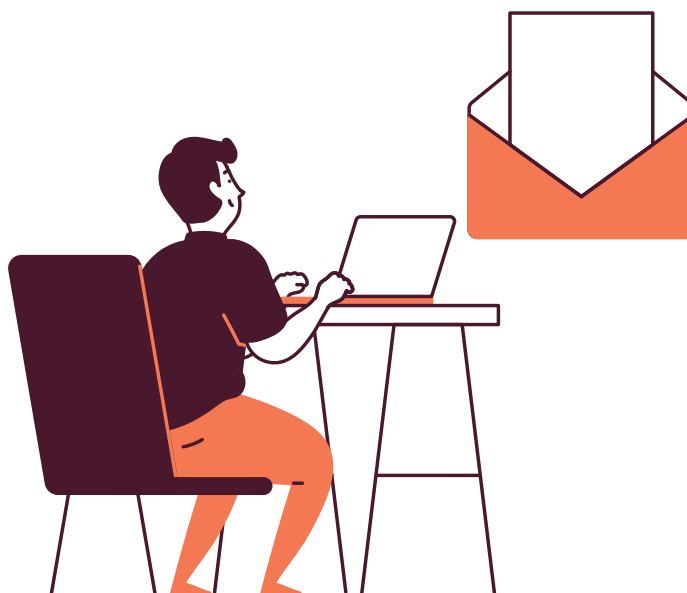
**“If you are not careful, everything ends up at the Bursar’s desk.”**

**“A Bursar can become a bottleneck as they are the person everyone knows and is easiest to contact.”**

**“There are expectations of immediate contact, immediate results, immediate actions.”**

**“There is a limit to how much you can fully delegate with complex new compliance issues.”**

**The visibility and accessibility of the Bursar often lead to everything being routed through them, whether or not they are the best person to respond.**



### Limited support and budget constraints

Many Bursars work without the team structure they would ideally want, particularly in smaller schools where cost constraints limit the capacity. Therefore, they feel they have to play a more hands-on role.

**“As a small school we do not always have the staffing resources required to fulfil all the roles needed to run the school smoothly and instead find ourselves firefighting.”**

**“The role has got exponentially bigger at a time when budgets are being cut so the support is smaller.”**

**“The skills of our professional support teams are increasingly not where they need to be but budgetary constraints mean that recruiting qualified professionals to new roles is challenging.”**

### Bursars as problem solvers

Bursars tend to be naturally hands-on and practical. They want to help and are good at it, but this can sometimes lead to over-involvement.

**“We are naturally problem solvers, but you need to be assertive in how you delegate and not be afraid to say – “that’s not my issue to deal with.”**

**“The worst thing is that we firefight a lot. There is a lot of “this has gone wrong; how do we deal with it”. But at the very least we also need to think about what we can do to improve.”**

**“As Bursars, we may have a traditional work ethic of always doing something and find it difficult to build in time to think.”**

### Skills, comfort zones, and cultural shift

Some of our participants, who were not Bursars but from other school leadership roles, wondered whether the challenge of finding time for the important is purely as a result of external factors, or whether it also relates to a ‘Bursar mindset’ and habits. Do some Bursars struggle to get out of their comfort zone? Is there more to this problem than just the demands of the job and freeing up time?

**“With long serving Bursars there is the risk that they will devote time to areas they are best at or most comfortable handling.”**

**“Becoming more strategic is not just about freeing up time, it’s also, for some Bursars, about stepping out of their comfort zone, thinking long term.” ■**



# Smaller schools, bigger challenges



Throughout our conversations, one refrain came up time and again: 'and this is even harder in a smaller school.' That sentiment was so frequent and emphatic that it became clear a dedicated section was needed to recognise the unique pressures faced by Bursars in smaller settings.

In our sample, 22% of schools had fewer than 250 pupils and 8% had fewer than 150. The majority of these are standalone schools, operating without the backing of a group. They face the same breadth of responsibilities as their larger counterparts, but with significantly fewer resources, limited access to specialist advice, and much leaner staffing.

Bursars in smaller schools spoke candidly about the reality of wearing multiple hats, finance, HR, estates, IT and more, often with little or no direct support. The margin for error is narrow. A staff absence or a small drop in pupil numbers can have an immediate and disproportionate impact. Many also spoke of the professional isolation that can come with the role.

The challenges discussed throughout this report, including the scope of the role, managing workload, and finding time for the strategic, are all amplified in smaller schools. Some Bursars described the job as becoming unsustainable in certain settings, with high turnover often cited as evidence of the strain.

**“Having worked in a range of Bursar jobs, I am convinced that the Bursar role at the smaller school is the most challenging.”**

**“Small schools with less than say, 150 pupils, are on a knife-edge. Even small reductions in pupil numbers can put a school in a loss-making position.”**

**“In a small school you are the HR Manager, the Head of Finance, the Estates Manager etc, you have to do everything, so it is very difficult to get involved much in strategy.”**

**“Being a very small school with a small support staff workforce, one member of staff being off can be hugely impactful especially to the Bursar.”**

Despite these pressures, many Bursars also shared thoughtful and practical strategies for coping and thriving in the role. There is no easy answer, but a few suggestions were offered:

- Prioritise financial and HR knowledge when recruiting.
- Leverage ISBA and similar networks for peer support.
- Proactively seek advice rather than wait for crisis points.
- Cultivate resilience and emotional support networks.

**“Key priorities are finance and HR. Without these, it will be an even greater learning curve.”**

**“It’s so important for small school Bursars to be well connected with ISBA and their network. It’s vital to have people they can learn from.”**

**“You need to be good at getting advice and not being afraid to ask for help. ISBA are brilliant in providing this support.” ■**





**PART** *three*



# Strategic thinking in action

# Stepping into strategy

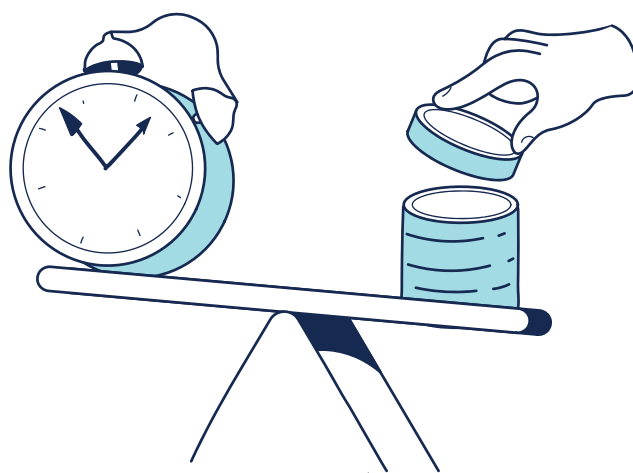
As we have seen, with intensifying financial pressures comes the move to the forefront of the commercial aspects of school leadership. Bursars are now expected not only to manage operations but to shape strategy, often driving initiatives critical to the school's long-term viability.

This shift demands time, focus, and a different mindset. Bursars must look beyond routine tasks to identify emerging trends, explore alternative revenue models, and lead the organisation through complex, sometimes controversial, change.

**“There is definitely a greater emphasis on strategic work. We are now proactive instead of reactive (where possible!).”**

**“In the current financial crises facing schools there is a strong argument for more strategic Bursars.”**

**“Strategy seems to be everything these days, and I find myself having to think commercially all the time.”**



Bursars emphasised the need to step back from immediate operational demands to enable more strategic work. Doing so might mean spending time visiting other schools, exploring partnership opportunities, or building external relationships.

**“Bursars need to invest time understanding the sector, visiting other schools and learning from other Bursars – for example on generating non-fee income.”**

**“There are great examples of Bursars getting out and learning about opportunities for their own school development. This is time well spent.”**

**“Strategic change is more important because schools will need to make decisions around cost savings, headcount reductions, moving to more cost-effective means of delivery and increasingly planning for mergers.” ■**

## WHAT DOES 'STRATEGIC' LOOK LIKE IN PRACTICE?

Strategic working is often associated with long-term thinking, vision setting, and planning. For Bursars, this increasingly translates into:

- Focusing on staff numbers, costs and utilisation, considering significant reorganisation and changes to terms and conditions.
- Reviewing processes to ensure efficiency and achieve cost savings.
- Challenging traditional operating models - timetabling, staffing, structure of the school year.
- Undertaking fundamental reviews of costs and performance.
- Redirecting resources - e.g. towards marketing, international recruitment, or digital innovation.
- Reconfiguring provision in response to demographics or market shifts.
- Considering more drastic changes and scenarios: exploring mergers, alliances, asset sales or even closure.

These actions are not abstract or academic - they are grounded, data-led decisions shaped by the school's real operational constraints:

**“ Nowadays, I spend a lot more of my mental energy thinking about the school and more strategic questions such as:**

- **Have we got the fee strategy right?**
- **Are we investing enough in Marketing and Admissions?**
- **How do our fees compare and why would people choose us?**
- **What is happening in the mergers and acquisitions world, which competitor schools are combining?**
- **Should we merge with a junior school, what about a Nursery?**
- **Do we need all our land?” ■**



## MOVING ALONG THE OPERATIONAL-STRATEGIC CONTINUUM

Another way of thinking about 'working more strategically' is to imagine a continuum with operational at one end and strategic at the other. The aim is to spend more time operating towards the strategic end. Many Bursars described their professional development as a shift along this continuum. The challenge is not just to do more, but to think differently.

The sort of habits and practices identified by Bursars include:

- Pausing and reviewing what happened rather than ploughing ahead – thinking rather than doing. Spotting and diagnosing patterns such as repeating or common problems.
- Distinguishing signal from noise, working out what is important.
- Having a clearer sense of sector developments, casting the net wide for new ideas and best practice that could apply locally.
- Being more aware of political, economic, societal and technological change and anticipating how the school could respond.
- Considering what-if scenarios around how the school could operate differently.
- Joined-up thinking: how decisions fit with the school's longer term aims and values, understanding knock on effects and seeing the big picture.
- Managing change: designing, planning and executing change, such as organisational, processes and ways of working. Taking a holistic approach to ensure changes are more sustainable.
- Finding a way forward despite conflicting priorities, views and stakeholders' needs.

### How are Bursars making it work

We have already commented on the challenge of finding the time and headspace to work strategically. So, what are Bursars doing to protect time for strategic thinking and long-term planning? We observed several facets to success:

- Blocking out time in diaries and strictly adhering to this.
- Enabling confidence and capability to deliver among the wider team.
- Accessing coaching to enable focused thinking time on strategic issues.
- Personal development to mitigate a potential tendency to deal with the urgent.



We found relatively few examples of structured support to help Bursars develop their ability to think and work more strategically.



We explore support for Bursars in more depth later in the report. However, it is worth noting here that we found relatively few examples of structured support to help Bursars develop their ability to think and work more strategically. The main sources of support tended to involve informal guidance, often provided by a particular governor.

**“Part of coaching could include helping you work more strategically. It’s not just about having the time and support, it’s also about being able to delegate effectively, and step away from what might be a comfort zone of being in the detail. I am sure that I have been too quick to get involved in things myself, instead of empowering people and supporting them.”**

This Bursar’s reflection reinforces the importance of not just creating time, but also developing the mindset, confidence and clarity required to make best use of it - balancing approaches to enable effective use of time to have strategic impact. ■

## CREATING STRATEGIC CAPACITY AT AN ORGANISATIONAL LEVEL

Increasingly, Bursars are also thinking strategically about their own teams: how to develop internal capability, structure departments, and make best use of technology. This internal focus is critical to sustaining the wider contribution they are now expected to make. Although it was acknowledged that this was not a quick fix and may be out of reach for some, many felt it is what is required to make meaningful progress.

**“The key is the staffing structure, which is held back by financial concerns, and then empowering people in your team to take on more of the day-to-day decisions.”**

**“I spend some of each day working out what other people should be doing rather than me. The Bursar (and Head) should in my view focus on the things only they can do, or things that develop their learning/personal competencies.”**

**“You need to encourage staff not to 'push up' problems. Often, they are fine with the easy decisions but want anything more difficult to be pushed up the chain of command. Training and giving them confidence to make decisions is key. Many decisions are reversible and/or don't have major consequences. I sometimes say, 'remember we are running a school, not a nuclear power station'.”**

**There is now much more of a strategic partnership and leadership and management are more distributed.**



We observed a trend, particularly among the longer serving Bursars, where the Bursar is no longer the sole source of operational authority across the support functions. Rather, in these instances the role increasingly involves working alongside other colleagues who hold significant leadership responsibilities in their own right, such as HR, finance and IT professionals.

**“The Bursar is more the conductor of the orchestra rather than controlling or dictating what happens.”**

Our findings also highlight the increasing requirement for Heads to be much more commercially focused. As CEOs, they have greater responsibility and focus on the financial side of their school. Previously, a typical Head might be required to focus solely on education and leave the Bursar to handle the business side. There is now much more of a strategic partnership and leadership and management are more distributed.

This redistribution is also evident in how risk is managed. Rather than being the sole owner of operational risk, the Bursar, particularly in a large school, may now act as a coordinator across departments where accountability is increasingly shared. This reflects increasing complexity in risk management, as well as a more holistic and strategic approach. ■

# Innovation and income in a changing landscape



## ENTERPRISE AND COMMERCIAL ACTIVITY: A GROWING IMPERATIVE

With rising financial pressures, reducing fee-dependency is an increasingly important part of school strategy, with many schools focusing on enterprise activities, fundraising or the establishment of international schools. Of these, enterprise activities are most likely to be the responsibility of Bursars. Indeed, 17% of Bursars surveyed selected 'entrepreneurial ability' as one of the top 3 skill areas which has increased the most in importance in recent years.

For some schools, commercial activities are still in early stages.

**“We are still very new to non-fee income. My colleagues set up a new, online teaching offering but there were no basic management processes put in place, like having a meeting to discuss what was going to happen, budgets, forecasts etc.”**

For others, they are now embedded into core operations and viewed as essential to future sustainability. Some Bursars describe an evolving mindset, where enterprise is no longer seen as a peripheral, out-of-hours function, but rather a strategic priority.

**“We do more scenario planning than ever before with increased focus on other revenue-generating areas including fundraising and commercial activities.”**

**“We have had successful lettings with good commercial income, but are now exploring very new ideas – thinking outside the box. If half of the things materialise, education will be only one part of our business.”**

Despite its strategic value, enterprise activity can be met with resistance.



Despite its strategic value, enterprise activity can be met with resistance, particularly from academic staff concerned about its impact on teaching and learning. Some Bursars reported tensions over perceived disruption during holiday periods or a lack of internal consultation in how initiatives were implemented.

**“It’s important to note that if you don’t drive this, the academic staff won’t. Indeed, they often see it as disruptive and are quick to criticise or find fault. A lot of academic staff may see it as a bit grubby and irritating. In the early days I could guarantee that the first meeting of the new academic year will include several blasts from academic staff on the appalling way in which the enterprises had been allowed to occur over the holidays.”**

**“My first two Heads and Chairs would not allow generating non tuition fee income to get in the way of school operations.”**

In the following case studies, we explore how schools are approaching enterprise development in practice. These examples highlight emerging models, illustrate the shift in mindset, and share lessons from schools that are embedding innovation into their long-term strategy. Through these experiences, we gain clearer insights into what good practice looks like and how Bursars can lead the way in reshaping income generation for the future.

## A strategic approach to enterprise

Dorothy McLaren, CEO of the Schools' Enterprise Association (SEA)

### How does the SEA help schools?

We are an association supporting schools with their development of non-fee income through additional commercial activities. We have insight into best practices across the UK and abroad and share this knowledge with member schools, providing advice and guidance.

### How are schools changing how they organise enterprise activities?

Most schools used to take an opportunistic reactive approach. There was rarely much of a plan – you were just wholesaling your space, selling it to the first person who asked, agreeing a price they were willing to pay. Nowadays schools are seeing enterprise activities as a real business. This requires more than an Events Manager and several schools are appointing highly paid Commercial Directors with a business development background and entrepreneurial acumen.

### What is best practice?

Best practice examples in the UK showcase a school's key unique selling points, driving revenue, admissions and brand positioning, whilst also delivering commercial returns.

The focused school uses these offerings strategically to support its marketing and admissions programme, encouraging participation from future pupils, giving them an introduction to the school's product whilst simultaneously generating commercial revenue.

### How much enterprise revenue are the most advanced schools planning to make?

Where the commercial opportunity is fully understood and developed, schools could be aiming for an additional 15-20% of current fee income. It's best to express it as a proportion of fee income since any profit target would be so dependent on how you decide to allocate costs from the school's main operation.

### How much enterprise activity is happening now?

It varies greatly across schools and accurate comprehensive information is not available. The most advanced schools are up to 15% of fee income but many are still closer to zero. Whilst the specifics are not clear, the short answer is 'not enough', and indeed this is why I set up SEA to address this untapped opportunity. Perhaps the key factor, therefore, is appetite. How much does a school need and want this to work. The demand is there, the opportunity is there but you need to fetch it.

### What are the biggest challenges schools face?

We recommend separating enterprise activities from the traditional finance function. In larger schools, this could mean reporting separately into a COO role, perhaps as part of an External Relations team, which could include the Marketing and Development functions, which share an external perspective.

Schools can often be concerned about potential disruption of enterprise activities to a school's operation. However, when managed well this is typically not the case. Communication is key to minimising disruption and managing expectation. It is also important to share the value that commercial activity brings to the school.

## The most advanced schools are up to 15% of fee income but many are still closer to zero.

### What sort of additional skills do Bursars need?

You need imagination and vision to identify opportunities beyond the normal school day operation, and you need to be able to get others' buy-in. Having said that, our strong recommendation is don't try to run this yourself. Appoint someone from outside the school who has the capacity and experience to develop the strategy, get internal buy-in and drive it forward, optimising the returns.

### What other sectors can schools learn from?

A good comparison is the national museums and galleries sector. A change in the law in 2001 meant they could no longer charge entrance fees. They, therefore, had to adapt their approach becoming much more entrepreneurial with the use of their facilities and in selling other products and services. Like schools, these historic buildings often have wonderful assets which can be used beyond their core purpose of curating artefacts and generate much-needed additional revenues.



## CASE STUDY

**Expanding income beyond fees through strategic enterprise**

Mark Taylor, Bursar and Clerk to the Governors at King's School, Canterbury

**How has your approach to enterprise activities changed over the years?**

We have come a long way since my first involvement as Deputy Bursar at Cranbrook School when I would try to squeeze in the odd external organisation using our sports facilities and spend most of my time apologising to staff for any disruption!

We've gone from seeing this as an outside of term time bolt on, that the SLT were not really involved with, to a core part of our school's strategy that the governors have set as an objective to make up to 10% of our year end surplus and operates throughout the year.

This strategic approach is also about finding synergies with other parts of the school. For example, we have started running in-house residential holiday courses and are working with our Admissions team to use these to market our school to potential recruits.

**What are your main enterprise activities?**

At King's Canterbury our key breakthrough, under the guidance of a very business-minded governor, was to design new school facilities with enterprise in mind. We purchased some derelict buildings on 3½ acres in Canterbury and turned these into a theatre and an international college. Our brief to the architect for the theatre was to include a box office, green rooms, orchestra pit etc, fit for a top-quality commercial operation. The theatre won several design awards and is fully booked for much of the year.

The international college was designed more like a hotel with ensuite twin rooms and flexible fittings and fixtures. As well as new income from international students, it makes wonderful accommodation for up to 85 people on residential holiday courses and, importantly, if the international college didn't work out, we know we could sell it as a hotel.

**What's your advice to Bursars with less experience wanting to make progress?**

It's important to lay the groundwork. Talk to your Head to get their buy-in to this becoming a core part of your school's strategy and agree the benefits of reducing dependency on fee income. Then you need to sell it to staff, explaining the school's financial challenges and enterprise opportunity. I remember having to push this quite hard, but I think this should actually be easier nowadays given the quadruple financial whammy schools are facing.

Then you do your analysis of options for your own school in your particular location. I would highly recommend Bursars contact The Schools Enterprise Association for ideas, advice and networking opportunities. You then draw up a list of proposals and discuss and agree your strategy with the Head and SLT.

**What sort of skills and qualities are particularly important for Bursars?**

As well as the financial and commercial angle, you need agility, creativity and entrepreneurial skills. You also need the drive and enthusiasm to sell the ideas to the Common Room. The ability to communicate clearly, both orally and in writing is critically important. ■

## NEW TECHNOLOGY: EXPERIMENTATION AND EFFICIENCY

While much of the IT innovation in schools has focused on teaching and learning, a number of Bursars are also beginning to explore the use of digital tools and automation to support operational efficiency enabling strategic capacity at many levels. In some schools, AI and workflow automation tools are now being used across areas such as data analysis, communications, and safeguarding. They are also being used to assist with meeting notes and summarising key information. These are often low-cost tools already available through existing software subscriptions.

However, it is evident from our research that these developments are not yet widespread. There are, however, early examples of practical applications that are saving time, improving accuracy and enabling staff to focus more on analysis and insight rather than manual data gathering. We conclude that this is an area which is prime for further development and in the meantime, we are sharing examples from one school as food for thought. The case study suggests that digital tools are beginning to make a quiet but valuable difference to how support functions operate. However, it also highlights the importance of identifying simple, clear use cases and building digital capability gradually through experimentation.



### Use of technology and AI in the Bursar function

**Justin Hodges, Director of Finance & Operations at Abingdon School, shares how his team is using AI and automation to improve productivity and modernise operational practice.**

#### Early days, growing potential

There's a lot of talk about AI in schools, but when it comes to the Bursar function, practical examples remain limited. While there's plenty of excitement, most of the real innovation so far has happened in the classroom, not the back office.

I'm part of the AI in Education COO panel, and what's clear is that while the appetite is there, widespread adoption is still in its early stages. At Abingdon, our focus has been on using technology to drive productivity, whether through simple automation or more ambitious AI-based tools.

#### Building the right foundations

One of our first steps was appointing a Director of Digital Transformation - someone with a background in teaching and a real interest in tech. Together with our IT colleagues, they work across the school as an internal consultant.

#### MyAbingdon: A platform for insight

We created MyAbingdon, an in-house platform that sits on top of our school database (iSAMS). It pulls together all the data staff need, displayed in a consistent, easy-to-use dashboard format. For example, a Head of House can view a student's attendance, academic record, commendations, sanctions and more - all in one place. We've built similar dashboards for trips, risk assessments, accidents, and pastoral care, helping staff work more efficiently without needing technical expertise.

#### Small changes, big gains

One of our earliest wins was digitising how we collect new parent information. Previously, it involved sending out several PDFs. Now, parents log in to MyAbingdon and enter everything directly. Annual data updates are handled the same way.

We also use AI to assist with drafting and note-taking:

- Our Financial Controller uses AI to help write more sensitive bursary letters.
- We use NotebookLM to summarise long reports for governors.
- As a Google School, we use their transcription tools to capture meeting notes.

...continued

### Automating the repetitive?

We're also experimenting with AI in risk assessments. The tool is still basic, but it prompts the right questions and supports consistent thinking. In finance, we've built a Zapier bot to automate the processing of gas and electricity bills. It produces spreadsheets that highlight discrepancies and compare usage year on year - saving time and enabling more valuable analysis. We're now exploring similar approaches for catering and other cost areas.

### Smarter safeguarding

A standout project has been our use of AI in online safeguarding. Our filtering system was producing too many false positives, overwhelming the safeguarding team. By building an AI model, we've been able to reduce noise and prioritise real risks - delivering clearer, more focused reports that support faster intervention.

### What's next?

We're currently developing a tool for bank reconciliation. Each morning, a member of the team reviews transactions and matches them with codes in our accounting system. We're now using AI and APIs to suggest matches - speeding up a process that's traditionally slow and repetitive. A person still signs it off, but it's a meaningful time-saver.

### Reactions and readiness

Reactions from colleagues have been mixed. Some are energised by the changes, others more cautious - especially where job roles are affected. That's understandable. But I see this a bit like the introduction of spreadsheets: at first, it's disruptive, but eventually it frees people to do more interesting and meaningful work.

We've focused our initial efforts on departments showing enthusiasm and initiative. As their stories circulate, they help build trust and momentum across the wider team.

### Managing risk and responsibility

Of course, with innovation comes responsibility. Data privacy is built into everything we do - privacy by design is essential. So, we developed an internal AI chat portal, so staff can use a range of AI models in a secure, closed environment and ensuring no data leaves the school.

As reliance on digital systems grows, we're also doubling down on cybersecurity. This is about long-term resilience as much as it is about efficiency.

### Sharing innovation beyond Abingdon

Some of our internal projects have started to evolve into services for other schools. We've launched a website, [ABX.org.uk](https://abx.org.uk), to showcase MyReports, a reporting tool designed to support teacher workload. Teachers input a few keywords about a student, and the system drafts a report in our house style. Teachers remain fully in control of the final version, and parents are informed that AI is used for drafting support. The system also sequences reports: teacher inputs flow to Year Tutors, then to Heads of House, creating a clearer and more structured process.

While this sits outside the Bursar's core remit, it's a good example of how operational teams can contribute to innovation and even create new sources of income.

### What's your advice to other Bursars?

You don't need to be able to code, but it helps to be curious, open-minded, and aware of what's possible. I rely on a team that understands the tech, but my role is to connect the dots - spotting where needs arise and where technology can solve problems.

Our filtering system upgrade, for example, came from listening to the frustrations of safeguarding staff. That's where most good ideas begin. For me, it's not about tech for its own sake. It's about solving problems, making life easier, and helping people do their jobs better. ■



## MERGERS, ACQUISITIONS AND FUTURE-PROOFING

Mergers, acquisitions and partnerships are becoming a more common feature of the independent school landscape. Perhaps previously considered a last resort, they are now part of strategic considerations in schools of all sizes. For some, this is a response to immediate financial pressure. For others, it is a proactive, forward-looking move to strengthen long-term viability, which is motivated by longer-term strategic thinking. Bursars shared examples of schools entering discussions not because they were failing, but to ensure future resilience, access to shared services, or expanded pupil pipelines. In our conversations, there was a strong sense that there would continue to be consolidation across the sector and that this would accelerate over the coming years.

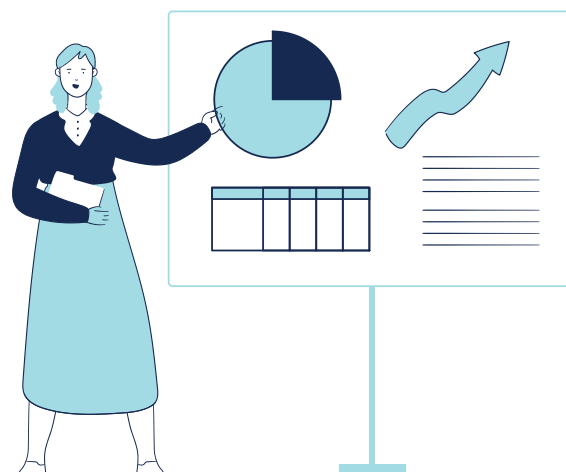
**“There have always been mergers and acquisitions with both for profit and charitable schools buying other schools, but the level of consolidation in the sector at the moment is unprecedented.”**

**“We were four schools when I joined but are now a group of 10 with over 3,000 pupils.”**

**“I believe that mergers and partnerships hold the key to the future of the sector.”**

Throughout our discussions, whilst defensive reasons for change were often talked about, there were many positive benefits to being part of a group cited:

- Synergies – e.g. purchasing power, shared overheads, back-office integration.
- Learning and sharing best practice, often with expertise in specialist roles – e.g. marketing and admissions, fundraising, compliance etc.
- Creation of strategic capacity.
- Management of waiting lists and feeder pools across the group.
- The opportunity of in-house career development and planned talent management.



### The role of the Bursar in mergers and acquisitions

In our sample, about 20% of Bursars work in schools that are part of a group. They reported that the group was likely to have a small central team who take the lead on due diligence and acquisitions and advise on post-acquisition integration of back-office systems and organisational restructuring. In the case of other types of schools, Bursars reported they typically set up project teams with senior leaders and governors to manage the project.

Where schools have merged, Bursars often play a pivotal role in implementing mergers. This can include leading on post-merger integration and navigating the cultural and operational complexities of combining schools.

**“The due diligence process can be quite intense – especially for small schools.”**

**“M&A may be more difficult in schools because of tradition, slower decision making, and lack of resources. We are seeing interim roles coming in to manage change in schools, e.g. the selection process for staff into the new structure.”**

**“There can be very difficult and complex land issues, to do with leases or rights of way, heritage grants with some local usage.”**

**“My responsibilities for finance, HR, compliance, IT, and commercial are at the forefront of post-merger integration.”**

For those, who are in the position of being acquired or asked to form a partnership with another school, their role is more likely to be helping the Board and senior leaders to be proactive, by facing up to the financial realities and ensuring that merging or being acquired by another school or group is a strategic decision rather than a last resort under duress. As one Bursar expressed it: 'if you don't have any other options then you don't have much of a negotiating position!'

## Mergers and acquisitions of schools: current trends

**Andrew Frame, Partner, Head of Education Mergers & Acquisitions (M&A) at Grant Thornton UK**

### What's your experience with M&A in the UK independent school sector?

Over the last six years I have advised a range of buyers and sellers involving over 40 independent school acquisitions. These have nearly always been for-profit entities on both sides of the transaction.

### How much M&A activity is there?

We keep a proprietary tracker of M&A across UK education and whilst deal volumes have been fairly consistent across the last two years at circa 250 transactions, the number of school transactions in 2024 decreased by 12% compared to 2023. Although, notably, we have already recorded seven transactions in 2025 so far, up from two deals in the first three months of 2024.

This data is indicative of the increasing challenges in the sector with for-profit buyers being more selective and charities completing an increasing number of mergers. This is reflective of a growing trend for prep schools to join ambitious senior school groups, providing a feeder pipeline and an offering for parents wishing to secure a place for their child's entire schooling.

### What market factors do you see affecting M&A?

For the last 20 years or so, for-profit school groups in the UK have been consolidating. More recently, however, these groups are now increasingly looking at also acquiring and converting not-for-profit schools which may be experiencing financial difficulty and can be run more efficiently through specialist central support teams providing economies of scale.

Rising fees have, for several years, masked challenges facing the sector, for example:

- Declining birth rate – mostly affecting prep schools.
- Declining interest from overseas students.
- Affordability becoming more and more of a question – with, of course, VAT only making matters worse.
- Increasing costs – now impacted further by NI increases and removal of rates relief for charitable schools.

We are now experiencing an inevitable contraction of the market; in the first four months of 2025, we have recorded 20 schools announcing closure.

Small schools, say, with less than 100 pupils are on a knife-edge. At that level, even small reductions in pupil numbers can put a school in a loss-making position.

The next big milestone will be September 2025 intake numbers. Generalising, admissions last September and January were not as bad as feared with perhaps continuity of education or hope that VAT might be delayed influencing parents' decisions. Parents may also be waiting to see what will happen to fees for the start of the next academic year.

### How have these changes influenced the acquisition price of schools?

Looking at for-profit schools we have seen valuation multiples reduce from the historic highs seen pre-interest rate rises in 2022 – i.e. the purchase price of schools as a multiple of annual profit. There are also examples of not-for-profit schools being transferred for free to avoid closure, or other examples where the price is linked to a discount of the vacant possession property cost.

The most attractive schools are larger senior and, in particular, all-through schools, as well as London schools which are seen to be more resilient. The market for these schools has remained more buoyant.

### What are sellers and buyers typically looking for?

In the case of for-profit schools, sellers are typically looking for a balance across a few key factors including:

- Cultural fit and legacy.
- Valuation – headline price as well as treatment of the balance sheet.
- Deliverability – e.g. due diligence requirements, track record, funding, timetable.

On the buyers' side, key factors include:

- School performance including financial returns.
- Trends such as pupil numbers and staff turnover.
- Quality of Head and leadership team.
- Condition of buildings, grounds and infrastructure.
- Demographics.
- Local competition.

On the not-for-profit side there is greater weight given to cultural fit and timing is a critical issue for schools in financial difficulty. Decisive action and good advice are key to respond to challenges with enough time, given a typical transaction takes six months from start to finish. ■

**PART** *four*

# Enabling success

A series of white, curved lines that originate from the bottom left and fan out towards the top right, creating a sense of motion and growth against the solid purple background.

# The architecture of effective bursarship



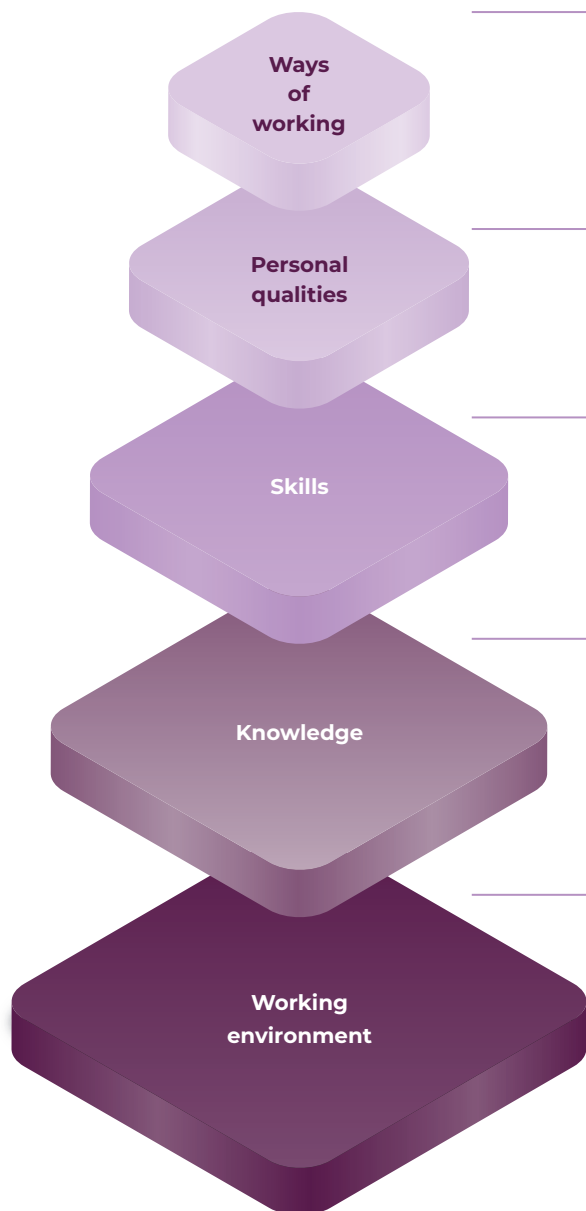
Effectiveness in a role is never just about the person. It is about the conditions, relationships, and support that make success possible – or impossible. Our analysis reveals there are five interconnected dimensions that influence the effectiveness of Bursars:

- Knowledge.
- Skills.
- Personal qualities.
- Working environment.
- Ways of working.

Together, these five dimensions form a model of Bursar effectiveness. Each layer is essential, but none stands alone. At the base is the **working environment**, which shapes whether even the most capable individual can succeed. The second layer is **knowledge**, a wide and constantly evolving field that must be confidently navigated.

Built on this are the interpersonal and analytical **skills** that allow Bursars to interpret and act on that knowledge. These in turn are sustained by **personal qualities**, particularly resilience, which enable long-term performance under pressure. At the apex are **ways of working**: the subtle, adaptive behaviours that help Bursars move between the strategic and the operational, the relational and the technical.

Each dimension has clear risks if absent. Without clarity of structure or governance quality, effectiveness collapses. Without resilience or the ability to build influence, even deep knowledge may be sidelined. These are not theoretical ideas; they emerged consistently from our research. Where one is missing, the rest are weakened. Success depends on the balance and reinforcement between them.



**Reflective practice, cross-functional collaboration, humility, confidence, doing the important and urgent**

This dimension represents the 'Art' in the Art of the Bursar: the ability to lead, adapt, and evolve in a dynamic and demanding environment.

**Resilience, humility, emotional intelligence, organised**

The Bursar's role is often isolating and politically sensitive. Personal clarity, tenacity, and perspective are what help leaders thrive amid complexity and competing pressures.

**Influence, strategic thinking, risk assessment and judgement, conflict management, diplomacy, problem-solving**

Success in the Bursar role depends not only on what you know, but on what you can do, especially in high-pressure, complex settings where effective working relationships are key.

**Financial literacy, legal and compliance awareness, HR practice, IT and cybersecurity, market context**

A Bursar's effectiveness relies on a broad yet precise understanding of the regulatory, financial, legal, and operational landscape. Knowledge must be both up-to-date and flexibly applied, with a recognition of when to seek external input.

**Leadership alignment, clarity of structure, cross-functional relationships, governance quality, external support**

Even the most capable Bursar will struggle in a context where leadership is fragmented, structures are unclear, or relational trust is weak. The working environment is the 'hidden architecture' of success.



## The working environment

A recurring theme throughout the research was the vital importance of the working environment in shaping a Bursar's effectiveness. The success of even the most capable individual depends heavily on the quality of people, structures, and working practices around them. From the strength of support teams to the clarity of reporting lines and the professionalism of colleagues, Bursars consistently highlighted that their ability to thrive - or even to cope - was contingent on these enabling conditions.

Above all, it was the quality of colleagues that stood out. Bursars repeatedly described the difference made by well-structured teams and the presence of high-calibre, non-teaching professionals in key areas. This was especially evident in HR, compliance and IT.

**“Once the team are in place it's hugely fun and rewarding despite the challenges that every job has.”**

**“The importance of others around you knowing what to do, and doing it well, has never been more important in my view.”**

**“We appointed our first ever HR professional two years ago. It has revolutionised my life, but more importantly made us much more professional.”**

Yet while some described working within strong, well-resourced structures, others painted a more constrained picture. Several Bursars reported feeling under-resourced, stretched thin, or unable to recruit appropriately qualified staff. The breadth of the role was frequently compared to equivalent positions in other sectors - only without the additional layers of support.

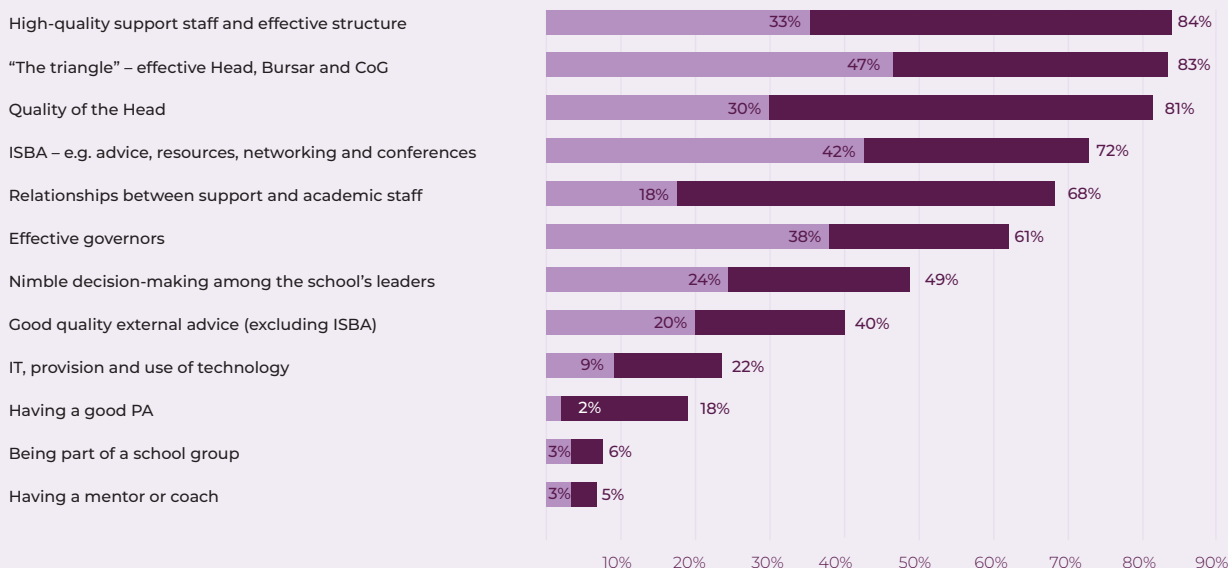
**“The breadth and scale of the role relative to similar roles in other industries is such that you'd either expect to have a better paid or higher level role underneath you to deliver much of the operation, or a Head who is able to effectively share some of the burden, as well as coach and guide.”**

The working environment, then, is not simply a background factor. It is a decisive influence either enabling the Bursar to operate with clarity and confidence, or restricting them in reactive, unsustainable modes of working.

## Key environmental factors

Chart shows the environmental factors selected as 'most important for success', and the factors selected as 'increased in most in importance' in recent years

Increased most in importance  
Most important



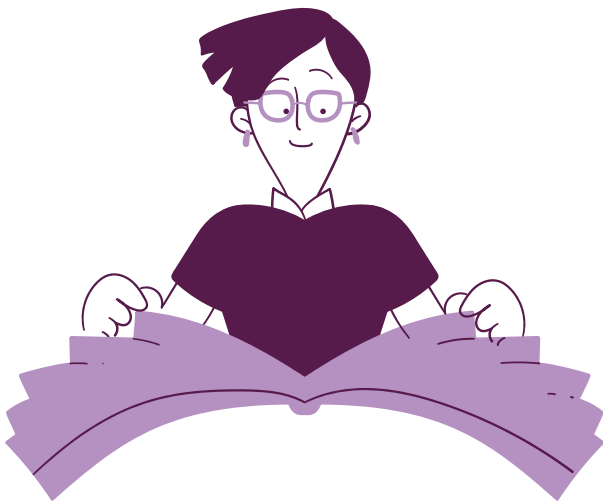
Knowledge

Given the wide-ranging nature of the role, it is no surprise that knowledge areas span far and wide. Financial knowledge stands out as paramount, with legal and HR knowledge also ranking highly. Bursars reported that finance and legal knowledge have grown most significantly in importance over recent years.

**“With the current issues schools are facing I think having a Bursar who does not have a finance background will potentially be a struggle. I feel for those that have never had to grapple with VAT and VAT rules.”**

In smaller schools, Bursars placed particular importance on having knowledge of compliance and inspection processes, as well as marketing and admissions. In contrast, Bursars in larger schools highlighted the value of understanding the competitive landscape, managing outsourced services, and staying informed on developments in IT.

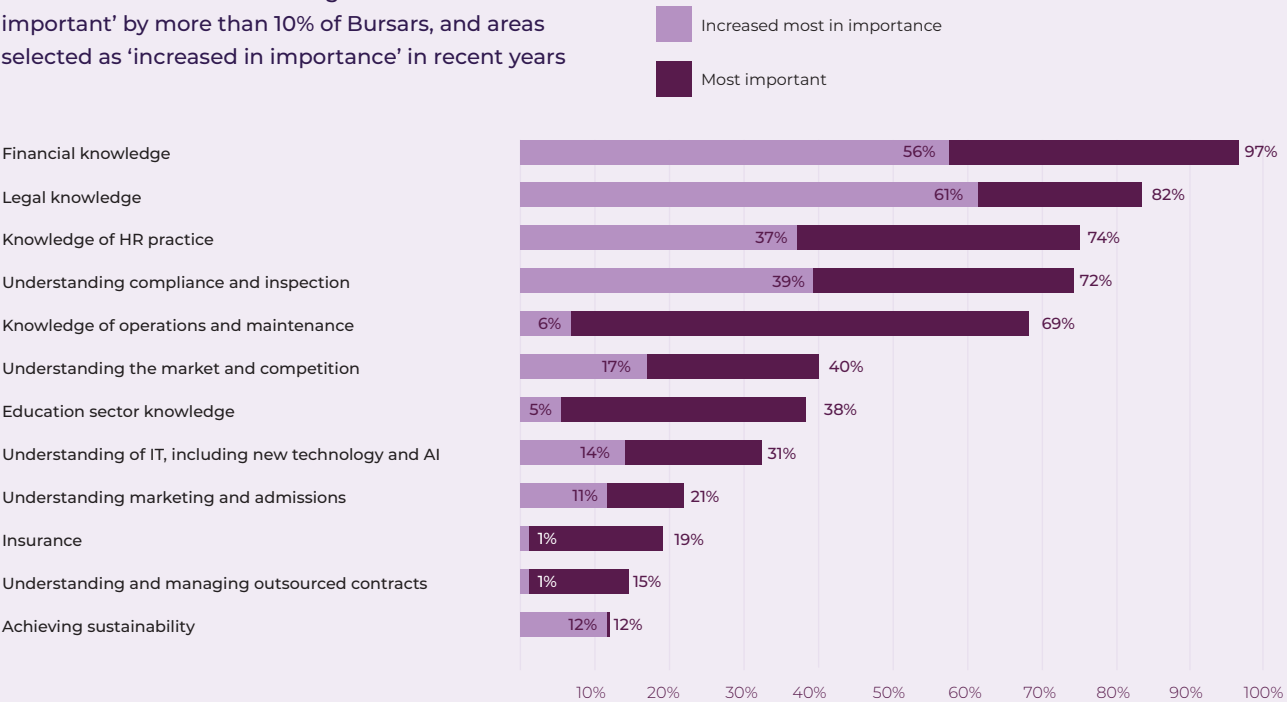
Despite these priorities, there was evidence of knowledge gaps for many, particularly in legal, IT, and compliance. Interestingly, however, nearly a fifth of Bursars felt there were no important areas where they lacked knowledge, although these responses were more common among experienced Bursars.



**“The Bursar has to know something about everything, but you don't need to know everything about anything!”**

Knowledge needed

Chart shows areas of knowledge selected as ‘most important’ by more than 10% of Bursars, and areas selected as ‘increased in importance’ in recent years



## Skills

Across the different school types and all levels of experience, the most important skill identified was the ability to influence and communicate effectively with a wide range of people. It is easy to see how Bursars are often in situations of potential conflict, whether it is chasing late fees, handling difficult staffing issues, upholding compliance issues or enforcing budgetary constraints. Bursars need the skills to make progress whilst avoiding unproductive and escalating conflict.

**“As time goes by, I feel more and more that diplomacy and tact are vital for success.”**

**“Being able to say no, but politely and constructively is important.”**

**“Bursars need to be skilled at conflict management – e.g. the sort of skills that mediators use such as reframing. They are dealing with highly stressed situations, for example with parents.”**

Bursars in smaller schools placed particular emphasis on tact and diplomacy, while those in larger schools more often prioritised the ability to distil complexity. Strategic thinking emerged as especially important among Bursars working in not-for-profit settings.

Despite the demands of the role, 38% of Bursars said they did not identify any skill in which they felt least confident. Given the breadth of responsibilities and frequent changes in regulation, Bursars repeatedly highlighted the importance of risk assessment, the ability to prioritise, and the confidence to seek timely advice.

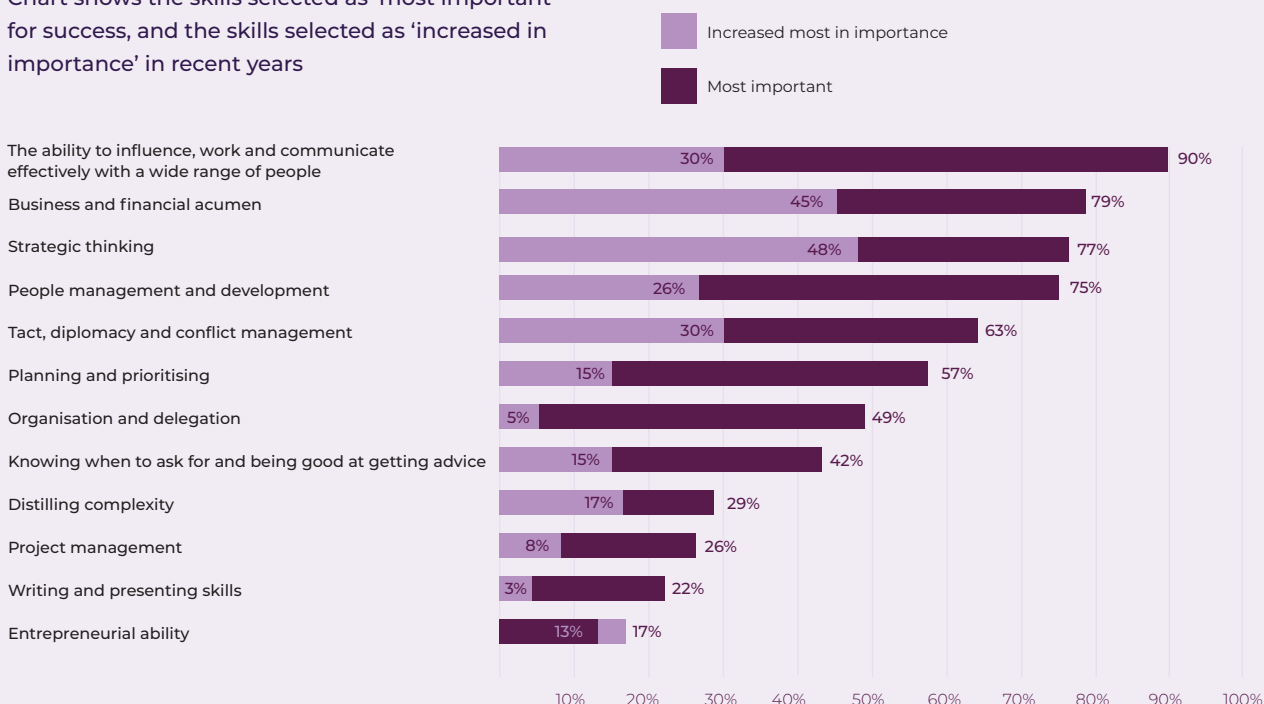
**“A key aspect is being able to identify what’s really important – assessing risks - where to spend your time and when to get additional advice.”**

**“A key element is knowing when to ask for advice. Of course, especially in a small school, you can’t afford much, but there are several situations where you may save money by not using legal advice but end up spending more in the long run because you started down the wrong path.”**

**“The broad width of responsibilities means Bursars will not have expertise in all situations that come across their desk. The challenge is knowing when and who to contact, this can be critical when faced with a very specific area where your existing advisors are out of their depth.”**

## Skills for success

Chart shows the skills selected as ‘most important’ for success, and the skills selected as ‘increased in importance’ in recent years



### Personal qualities

While knowledge and skills are critical, many Bursars stressed that success increasingly depends on deeper personal qualities: those traits that are often innate or developed gradually through experience. Among these, resilience emerged as the most frequently cited and important. Bursars described it not just as the ability to cope with pressure or adversity, but as essential to surviving the cumulative demands of the role.

**“I have seen so many people enter the sector thinking it is a walk in the park, but it is the hardest job you will ever do.”**

**“TPS consultation with 10 days of strikes is by far and away the worst four months of my working life since I left school 40 years ago. Covid was horrible... but compared to TPS it was a walk in the park.”**

For some, the emotional toll of the role, especially in smaller schools, can be magnified by professional isolation. Some Bursars spoke of feeling unappreciated or misunderstood, and of being left exposed when decisions proved unpopular.

**“Many of my peers have gone from the sector in the last three years, as the increased stress and challenges put on the shoulders of Bursars has been too much.”**

**“It’s a very isolated role at times and few people, perhaps just governors and the Head, understand the full scope of the role and the competing pressures. The fact that more than half of the workforce disappear in holiday periods is also a challenge.”**

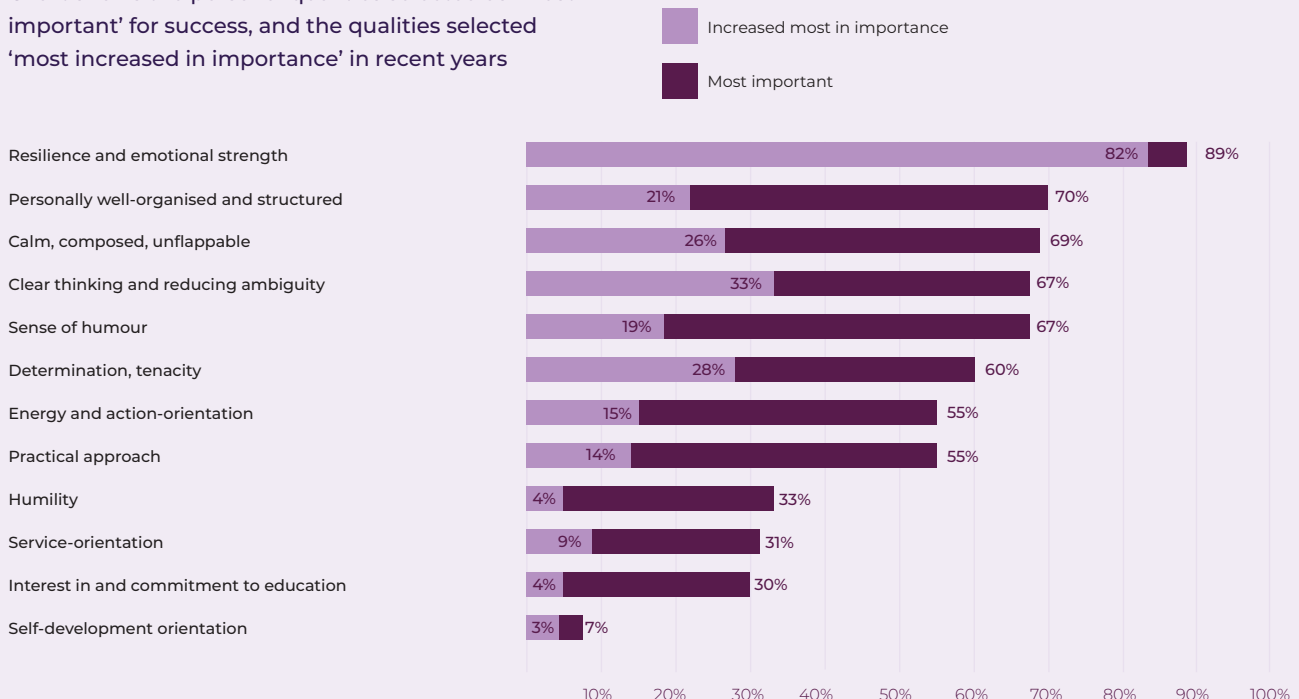
This reality has implications not just for retention, but for the wellbeing of Bursars across the sector.

**“I think the wellbeing of Bursars is a huge issue. This may be especially the case with smaller schools – who have all the pressures with even less support.”**

Alongside resilience, Bursars consistently referenced qualities such as clarity of thought, determination, humility, humour, and a strong orientation toward service. Some differences in emphasis emerged by demographic: female respondents more frequently highlighted organisation and resilience; male respondents were more likely to note humour, humility, and a service mindset. Bursars in medium to large schools particularly emphasised energy and action orientation as key traits for thriving in post.

### Personal qualities required for success

Chart shows the personal qualities selected as ‘most important’ for success, and the qualities selected ‘most increased in importance’ in recent years



## Ways of Working

The final dimension in the model of Bursar effectiveness is not a skill or knowledge area, but a way of operating. The habits, mindsets and behaviours that allow Bursars to manage complexity, lead through uncertainty, and balance competing demands. These are the often invisible practices that distinguish those who merely survive in post from those who thrive.

At its heart, this is about adaptability. The Bursar role demands frequent shifts in gear - from strategic planning to crisis response, from financial forecasting to managing interpersonal tensions. Those who succeed do so not just by working harder, but by working with intentionality, awareness and reflection. One Bursar described it simply, 'You only get to start your real job when everyone's gone home.' That sense of reactive overload was common, but so too was the understanding that proactive, thoughtful working habits were essential to rising above it.



Self-management and boundary-setting emerged as crucial. In a role with few natural limits, many Bursars spoke of the importance of prioritisation and conscious decision-making. Several described the benefit of stepping back to reflect - either alone or with trusted colleagues.

**“I’ve learned to take time to plan and decompress. It’s not just about what you do, but how you think through it.”**

Reflective practice was closely linked to peer learning and professional networks. Bursars consistently spoke of the value of connecting with others in similar roles - for technical guidance, moral support, and shared problem-solving. ISBA was often praised for fostering this sense of community.

Ultimately, ways of working are the behaviours that enable sustained performance over time. They support judgement, prevent burnout, and create space for leadership. In the absence of these habits, even the most experienced and capable Bursar may find themselves overwhelmed. ■



# Co-produced success



Throughout the research, one message was clear: the success of a Bursar is not theirs to shoulder alone. It is fundamentally co-produced, shaped by the quality of relationships around them, the clarity of governance, and the shared responsibility for leadership across the school.

The triangular relationship between the Bursar, the Head, and the Chair of Governors emerged as the most significant factor in enabling (or undermining) effectiveness. When these relationships work, they create trust, alignment, and a shared understanding of the school's priorities. If they fail then, the Bursar often finds themselves exposed, misaligned, or burdened with impossible expectations.

**“When Bursars fail it’s often when the links of the triangle break.”**

**“The ‘triangle’ is essential to a good school.”**

In some settings, the “triangle” becomes a “square,” with the Finance Chair playing a similarly influential role. Regardless of the specific configuration, the principles are the same: role clarity, open communication, and mutual respect are non-negotiable.

**“No secrets and no surprises. Easy to say but much harder in practice. This requires the building of trust, constant communication and being frank and open.”**

The importance of the Head–Bursar relationship stood out across the research. Bursars described the transformational impact of working with a Head who understood the financial realities of running a school and who valued the role of the Bursar as a strategic partner.

**“I now have a Head that understands the business aspects of the school and it has been transformational.”**

**“If the Head has a finance brain this makes a big difference.”**

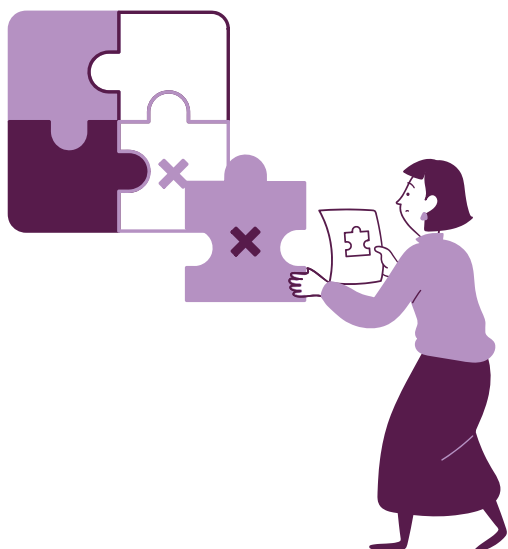
But the wider governance structures around this relationship also matter. As schools navigate a more complex operating environment, good governance has become more essential than ever - and more challenging to deliver. Bursars noted that governors were increasingly engaged, but also increasingly stretched.

**“I really appreciate the support of a fantastic body of governors and learn so much from them.”**

For some there was concern that the governance model has not evolved to reflect the complexity of the issues now facing school leadership. As demands on schools rise, so too does the need for governance that is more agile, strategic and skilled.

**“Much as the way Bursars, Heads and schools have changed, then so do governors need to change.”**

**“In such complex organisations, the well-meaning volunteer rarely has the depth of understanding of how schools actually work to take informed strategic decisions.”**



## As demands on schools rise, so too does the need for governance that is more agile, strategic and skilled.

This has direct implications for the Bursar. A lack of clarity over roles, blurred lines between strategic and operational oversight, or underpowered committee structures can all create ambiguity and inefficiency.

**“Words like nimble, flexible and agile are frequently used to describe how we want governance to develop, and the challenge is to understand what this means in practice.”**

**“Governors need to be more robust and braver in their strategic role, and more streamlined in how they operate – getting away from long gaps between meetings and unwieldy decision making.”**

The role of the Clerk to Governors adds another layer of complexity. While some Bursars value the connection this role provides with governance processes, others raised concerns about the additional administrative burden and potential conflict with their strategic responsibilities.

Taken together, these insights point to a need for more intentional, well-supported governance structures that recognise the scale and complexity of school leadership today. Where governance is strong, aligned, and supportive, the Bursar role becomes sustainable and highly impactful. Where it is fragmented or confused, the risk of overload and failure increases sharply.

For all these reasons, co-producing success is not an abstract idea, it is a practical reality. By investing in relationships, clarifying roles, and strengthening governance, schools are far more likely to retain capable Bursars and navigate uncertainty well. ■

# Evolving the role: Rethinking responsibilities and structures



As the scope and complexity of the Bursar role continues to expand, many schools are reconsidering how responsibilities are structured. The dual demands of strategic leadership and operational oversight can place an unsustainable burden on one individual, particularly in larger or more complex schools. Although as we noted at the very start of this report, it is precisely the breadth and variety of the role which is cited as the most fulfilling and rewarding aspect.

Some schools have responded by creating new leadership roles to share the load. These include positions such as Chief People Officer, or Director of Estates. Others have split the role entirely, appointing separate leads for financial and operational leadership. From our research, we observe that 10% of Bursars do not have responsibility for operations. In other cases, schools are choosing to invest in specialist professionals as part of the Bursar's team, for example compliance, or IT to support the Bursar.

**“Ops and finance need to be different types of people with different skills and personalities.”**

**“Our school might be at the tipping point where a director / manager of operations is needed.”**

**“We restructured my role to first split out estates/operations under a COO and then HR under a CPO.”**



These changes are not about diminishing the Bursar's authority, but about recognising the complexity of the role and designing for sustainability. There is no one-size-fits-all model. Indeed, in our experience of advising schools, the right structure depends on the size, culture and strategic priorities of each individual school and its context. But the underlying principle is universal: the Bursar's role should be focused, supported, and structured to succeed.

## SPLITTING OPERATIONS AND FINANCE: ADVANTAGES AND DISADVANTAGES

### ADVANTAGES

- **Distinct skill sets and personalities:** Operations and finance require very different approaches, knowledge and ways of working.
- **Better fit for individuals:** It becomes easier to appoint people who are well suited to each function, reducing the compromise inherent in a catch-all Bursar role.
- **Potential structural efficiencies:** A qualified CFO may reduce the need for financial expertise at lower levels.
- **Greater capacity and focus:** More realistic spans of control and a clearer focus for each leader.

### DISADVANTAGES

- **Fragmentation of strategy:** Will strategic development become harder with two people instead of one?
- **Increased complexity for the Head:** There may be more direct reports and more voices at SLT.
- **Potential additional cost:** Two senior salaries may exceed the cost of one senior all-encompassing Bursar role.
- **Succession dependency:** Often difficult to implement without a change of incumbent.
- **Clerk to the Governors:** A decision must still be made on who holds this responsibility.
- **Recruitment risk:** Could splitting make the role less attractive to ambitious candidates seeking a broader leadership remit?
- **Risk of silos:** There may be a greater risk of fragmentation or reduced collaboration.

## CASE STUDY

### A strategic restructure at Rossall School Jeremy Quartermain, Headmaster at Rossall School

When our long-serving and highly accomplished Bursar moved on, we took the opportunity to restructure what had become an increasingly broad and demanding role. We replaced the traditional Bursar position with two senior roles: a Director of Operations and a Chief Financial Officer (CFO).

The Director of Operations now oversees estates, maintenance, IT, catering, housekeeping and enterprise activity, while the CFO manages all financial matters and strategic financial planning. We retained a part-time Clerk to the Governors.

This change was driven by a recognition that the role of the Bursar had, increasingly, been stretched too thin. This resulted in the majority of time being devoted to reactive firefighting and this was particularly evident during the pandemic. There simply was neither the time nor the capacity necessary to devote to strategic planning or systems improvement. I should add that we were very blessed inasmuch as we had a phenomenally hardworking and highly experienced Bursar.

Consequently, we were concerned about overloading the Bursar role, worrying that it had become unsustainable, especially given the increasing challenges facing schools including the anticipated introduction of VAT. By dividing the responsibilities, we have been able to improve systems, find efficiencies and cost savings, as well as spend more time refining strategy, implementing change and developing exciting new enterprise opportunities. The new arrangement has also strengthened internal controls and with two experienced professionals working very well together, there's now a healthy culture of scrutiny and challenge and this leads to better-informed decision-making at senior level.

Although it does cost more, the investment is already paying dividends. I now have more direct reports, but the increased visibility and impact of these functions make that worthwhile. The only real challenge is recruitment, particularly finding the right Director of Operations, who must combine day-to-day management with long-term planning and enterprise development. Thankfully, in this regard, we have been incredibly fortunate. Overall, the restructure has brought clarity, capacity, and momentum to our leadership team.

The question of whether the Bursar should continue to act as Clerk to the Governors is also increasingly under review, especially in larger schools. While combining the two roles has been the norm in many schools in recent decades, this was not always the case. 40 to 50 years ago, it was more common for the Bursar and Clerk roles to be separate. Now, in a number of schools, particularly larger ones, there is a move back in that direction, with part-time Clerks, often with legal backgrounds, being appointed to serve the governing body more directly.

We heard a wide range of views about the Clerk role: who should hold it, what it involves, and whether it continues to be viable as part of the Bursar's responsibilities. Opinions vary not only between schools but also between Bursars, Heads and governors.

While some Heads and governors now question whether the Clerk role should remain a priority for the Bursar, given the scale and complexity of their other responsibilities, Bursars are more likely to see value in retaining it, particularly where the more administrative elements can be delegated.

**“Is the Clerk a strategic partner working alongside the Board and Head, or a secretary? Having the Bursar do it means you can be more of a strategic partner.”**

**“Appointing a separate Clerk to the Governors is absolutely essential to enable me to carry out the rest of my role effectively.”**

For some Bursars, the dual role works well, providing valuable continuity and insight into governance processes. But for others, it adds a significant administrative and legal workload that detracts from strategic priorities. The combination of servicing committees, managing board communications, and ensuring compliance with governance regulations can leave little time for the broader demands of the Bursar's core remit.

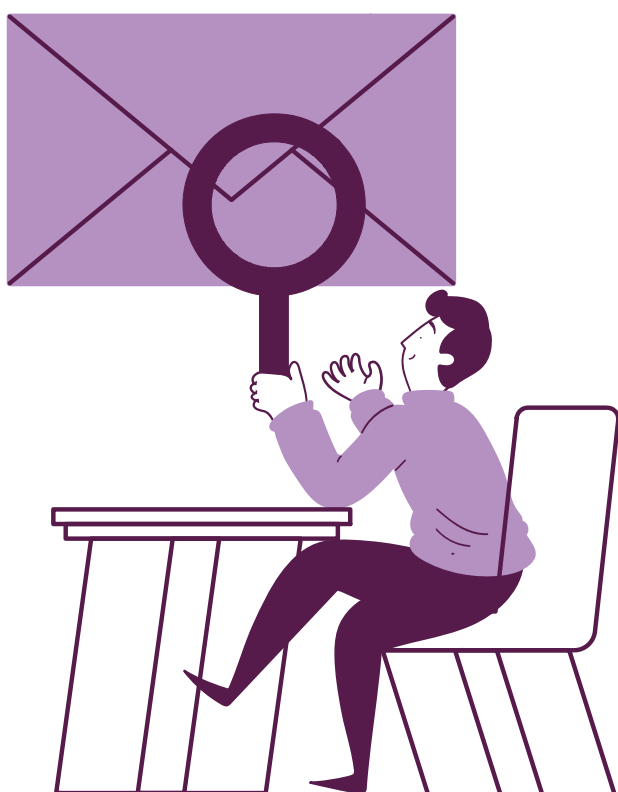
**“AGBIS are doing a lot of work in supporting the professionalisation of the Clerk role. The increasing need for governing bodies to be more professional and agile means that there are greater demands on the Clerk role. Doing this and the Bursar role at the level that is needed is virtually impossible in many schools.”**

**“When the Bursar has more pressure and needs to be strategic then separating the Clerk role is an opportunity to free up time. Bursars may like to be close to the governing body but is it really the priority?”**

As schools think about long-term sustainability and how to focus leadership where it adds most value, the Clerk role should be part of that conversation. Some may choose to retain the function within the Bursar remit, but where this is the case, the workload and boundaries need to be clear and explicitly supported. Others may benefit from appointing a dedicated Clerk, freeing the Bursar to lead more strategically. In schools where the Bursar retains responsibility, there is a clear case for delegating the administrative aspects of the role, exploring technological support, and openly reflecting on the reasons for holding on to the position. ■



# Implications for appointment, induction and development



As schools reconsider the structure and scope of the Bursar role - including whether to split responsibilities, invest in specialist support, or redefine the job title - it follows that the way Bursars are appointed must evolve too. A redesigned role demands a rethought recruitment strategy.

Traditional interviews, while useful, often fail to reveal the very qualities that are now most critical to success - resilience, judgement, adaptability, and the ability to lead through ambiguity.

## APPOINTING FOR SUCCESS

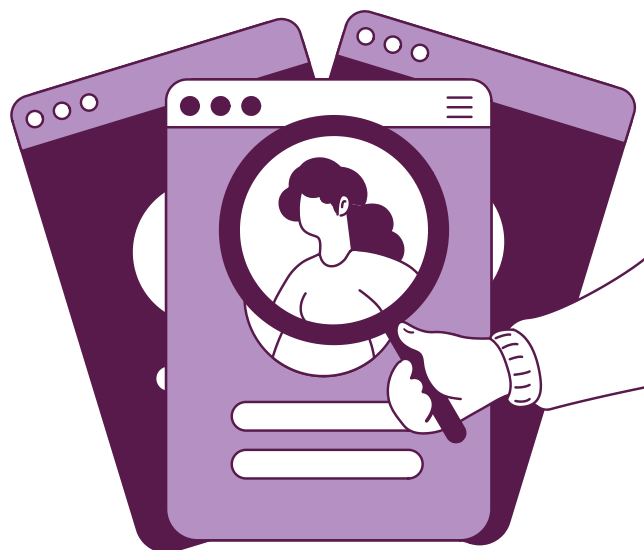
The success of a Bursar begins long before their first day in post. It starts with a rigorous, well-informed recruitment process that recognises the strategic weight of the role and the broad spectrum of demands it carries. Where once financial qualifications may have dominated shortlists, schools now acknowledge that no single candidate can be an expert in every area of the modern Bursar's portfolio.

**“It's almost impossible to find someone who is good at everything including strategy, finance and practical problem solving. Consider the attitude to risk, for example, an accountant vs a maintenance leader. Bursars are a special breed!”**

Instead, the focus is shifting toward professionals who can combine core technical competence with the capacity to lead, influence, adapt and collaborate. That shift aligns with the five dimensions of effectiveness set out earlier in this report: knowledge, skills, personal qualities, working environment, and ways of working. Appointments that reflect this broader understanding are more likely to result in long-term success.

A job description and person specification which is shaped with intention and focuses on the blend of attributes most likely to add value in context is essential. To inform this key questions need to be answered: What are the school's current and emerging priorities? Where are the greatest risks? What strengths already exist within the leadership team, and what do we need to complement them?

Crucially, effective recruitment looks beyond experience to assess how a candidate actually operates. Traditional interviews, while useful, often fail to reveal the very qualities that are now most critical to success - resilience, judgement, adaptability, and the ability to lead through ambiguity. The use of deeper, more diagnostic techniques are required to facilitate this.



This includes shifting the emphasis from broad checklists to focused, in-depth discussions. For example, exploring a candidate's experience of leading change can illuminate how they approach complexity, manage relationships, assess risk, and communicate difficult decisions. Behavioural questioning that draws on real past experiences, rather than hypothetical responses, provides far richer insight into how a candidate acts under pressure.

Inviting candidates to engage with real strategic or operational issues currently facing the school allows panels to observe how they think, collaborate, and navigate unfamiliar but relevant challenges. In this way, the recruitment process becomes not just a test of competence, but a meaningful window into how the candidate would lead in context.

Profiling tools, such as personality and behaviour assessments, can also supplement this process, as aids to reflection and dialogue. When used thoughtfully, they can highlight how candidates manage stress, respond to uncertainty, and build relationships. They also help prompt open conversations between candidates and panels about leadership styles and support needs. Finally, when assessing how well a candidate will work with the school's environment, it is important to move beyond notions of familiarity or fit.

Taken together, these changes represent a broader shift: from assessing who has the most experience, to understanding who will be most effective. Schools that embrace this approach are better placed to appoint Bursars who are not only capable, but equipped to thrive in the realities of the role.

## Appointing Bursars for the future: Insights from over 80 successful searches

Nina Lambert, Head of Commercial Appointments, RSAcademics

At RSAcademics, we have supported schools with more than 80 Bursar appointments over the past decade. These have included standalone prep schools, large senior and all-through schools, as well as for-profit education groups. This breadth of experience gives us a valuable lens on how the role is evolving and how schools are thinking differently about what they need.

### **While the core of the Bursar role has remained relatively constant, we've seen a clear shift in emphasis.**

Selection panels are placing greater weight on specific leadership skills and professional experience. As financial pressures grow, the ability to generate efficiencies, manage change and explore non-fee income streams is more important than ever. Finance remains a top priority, but it now sits within a wider set of expectations.

### **Strategic capability has become essential.**

Larger schools, supported by specialist teams, are looking for Bursars who can focus more fully on planning, forecasting and long-term decision-making. But even in smaller schools, candidates are expected to demonstrate they can operate both strategically and operationally. Where a dedicated HR lead is not in place, the Bursar must often take the lead on this function, which requires time, tact and a high level of confidence.

**The candidate pools we are shaping are broader and more diverse.** More schools are open to individuals from outside the education sector - particularly those with a strong commercial background. But there is a critical question that must follow: How will this person adapt to the school environment?

Rather than simply seeking "cultural fit," schools are increasingly focused on mission alignment. They are looking for candidates who can bring new perspectives while understanding and respecting the values and purpose of independent education. This might stem from being a parent, governor or former pupil or a genuine motivation to contribute to the sector.

**The relationship with the Head and SLT is particularly important.** Candidates will typically meet a wide range of colleagues during the process, and final interviews often include one-to-one time with the Head. A shared understanding of the school's values, and the ability to contribute meaningfully to senior leadership dialogue, is increasingly seen as vital.

### **We are also advising more schools as they consider the structure of the role itself.**

At the planning stage, many schools are asking important questions: Should we split finance and operations? Should the Clerk to the Governors role remain part of the Bursar brief? There is no one-size-fits-all model, but the days of simply replacing like-for-like without reflection are fading.

In all our consultancy discussions, we emphasise that splitting the role is not always necessary. Much will depend on the strength and clarity of the team reporting into these roles, and the context in which they operate. What works in one school may not work in another. Any structure must support both strategic clarity and sustainable delivery.

**Job titles are evolving too.** Larger schools are increasingly using terms such as COO or CFOO to reflect the commercial breadth of the role. Smaller schools often prefer Director of Finance and Operations (DFO), while some retain the title "Bursar" but restyle it as Bursar (COO) to help clarify scope and appeal to a wider field of candidates. These shifts reflect the increasing expectations of the role and the desire to attract individuals with strategic and transformational capabilities. ■

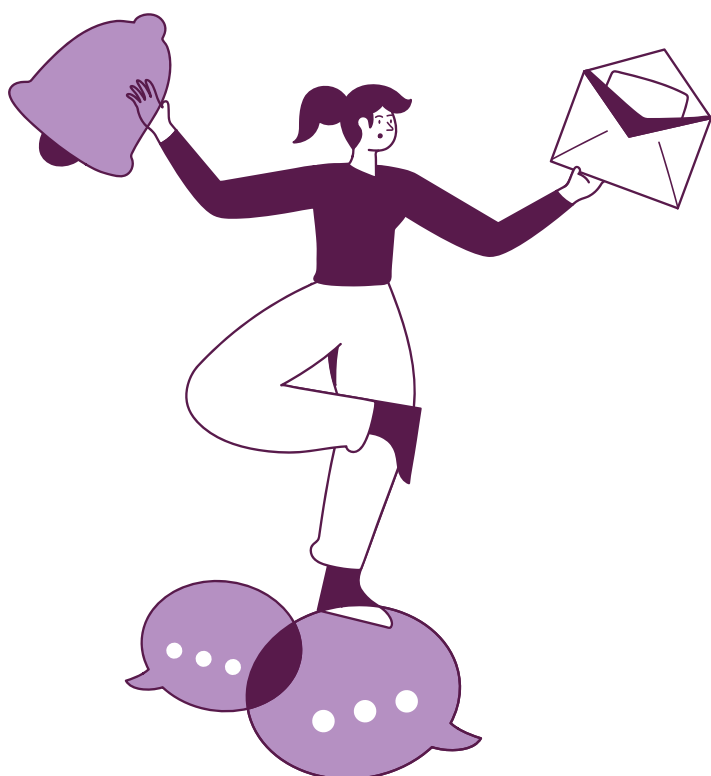


## LAYING THE GROUNDWORK: WHY INDUCTION MATTERS

Once appointed, the success of a Bursar is shaped as much by how they are supported as by who they are. In particular, the induction process plays a pivotal role in helping them gain traction early on - especially for those transitioning from outside the school sector. As earlier sections have shown, learning the cultural, relational and governance dynamics of a school can be as challenging as mastering its finances.

Effective onboarding goes well beyond administrative handover. It should include early engagement with governors and senior colleagues, time spent observing academic life, and a clear picture of where the biggest gaps and opportunities lie. Without this structure, new Bursars can find themselves firefighting from day one, setting a tone from which it is hard to recover. ■

Coaching, mentoring,  
and reflective learning  
are therefore not optional  
extras; they are enablers  
of sustainable leadership.



## PRIORITISING DEVELOPMENT, NOT JUST DELIVERY

Despite growing recognition of the role's demands, access to structured professional development remains inconsistent. Fewer than half of Bursars report engaging regularly with CPD. Many acknowledge that development often falls to the bottom of the list - a casualty of limited budgets, time constraints, and the mindset of simply 'getting on with it.' Leadership development and emotional resilience are particularly under-served areas.

**“In my experience Bursars are second only to HR Managers when it comes to avoiding spending money on their own development! This has only been made worse by increasing financial pressures.”**

**“It's a matter of professional pride and you don't tend to ask for help or say how you are feeling. You need a certain amount of courage to do so.”**

**“I should have got out and about to more schools in the first year or two. I came from a business background and (wrongly) felt that this seemed like a non-productive use of time. Of course, there is nothing more valuable than seeing other schools in action.”**

However, this reluctance comes at a cost. Without time and space to reflect, grow, or connect with peers, Bursars risk burnout, isolation, and a narrowing of perspective - just as the role demands broader thinking, deeper leadership, and greater emotional intelligence.

The most in-demand attributes - resilience, judgement, adaptability, leadership presence - are also the least likely to be formally supported. Yet in an environment where technical advice is readily available, it is these human qualities that increasingly define success. Coaching, mentoring, and reflective learning are therefore not optional extras; they are enablers of sustainable leadership.

**“The technical training and advice from ISBA is hugely welcome but I wonder if what is needed even more is softer skill development.”**

**“There is a lot of help with technical issues, but what about leading and coping?”**

### Coaching, mentoring and untapped potential

Although coaching and mentoring have become increasingly common for Heads, they are still underused among Bursars. Those Bursars who had accessed these forms of support reported significant benefits, including clearer thinking, stronger boundaries, and better confidence in their leadership.

Targeted support, particularly around role transitions, leadership development, and emotional resilience, represents a major area of untapped potential. This is especially important for Bursars operating in complex or isolated environments, where informal feedback is limited and structured reflection is rare.

### Growing into leadership: the role of coaching and mentoring

For many Bursars, stepping into the role means more than mastering finance or operations – it is about navigating complex relationships, influencing school strategy, and leading with confidence in an environment where their role is often misunderstood or isolated. To explore how coaching and mentoring can support this journey, we draw together the perspectives of a seasoned coach, a practised mentor, and a Bursar who has experienced both the challenge and the growth firsthand.

#### Finding a new way forward

After two years in post, one Bursar, a chartered accountant with a strong industry background, found themselves at a crossroads. 'Technically, I felt confident,' they said, 'But I'd recently been promoted internally at a large school and wanted to develop further as a leader, particularly within the Senior Leadership Team and in shaping my longer-term career.'

Coaching was suggested during a personal professional development review with the Head and Chair of Governors. The Bursar selected a qualified coach, someone they already knew through the ISBA network, and proposed a programme of six confidential sessions over a year.

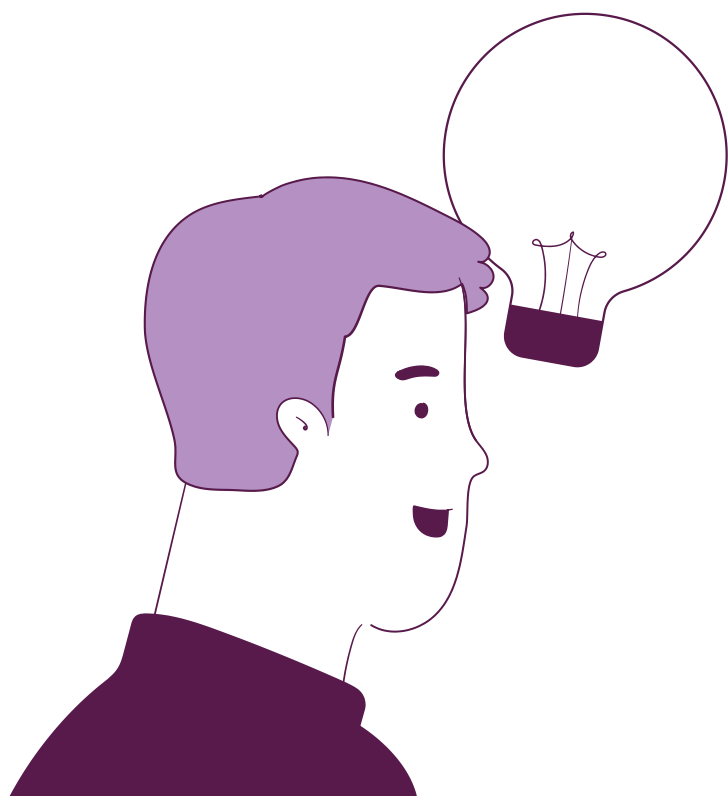
These conversations became a transformative space, 'The most valuable aspect was simply taking time to pause and reflect - something we rarely prioritise.'

#### Coaching for leadership: The power of reflection

Since 2009, Kim Gregory of Evolve Leadership Coaching Ltd has been coaching school leaders, including over a dozen Bursars. She describes coaching as 'rarely about fixing poor performance, but is typically about helping successful people navigate complexity, find sustainability, and increase their impact.'

Bursars, she explains, often come to coaching not because something is wrong, but because they sense something could be better. They may feel overwhelmed, uncertain about specific relationships, or stretched too thin. Coaching provides space to unpack these challenges and build forward with clarity.

...continued





In this Bursar's case, sessions explored both day-to-day scenarios and bigger-picture questions - like how to grow as a leader. Tools such as relationship mapping and role satisfaction reviews helped reveal what mattered most and where they could invest more intentionally.

Gregory often sees Bursars struggle with stepping into broader leadership roles. 'Many are confident in finance or operations but hesitate to contribute beyond their area,' she says, 'Coaching helps them own their place at the leadership table, challenge constructively, and build strong working relationships, particularly with Heads and Chairs of Governors.'

This was certainly true for the Bursar. 'I had perhaps underplayed my experience and strengths, but coaching helped me recognise them. I've since invested more in building relationships and now work far more effectively with colleagues - both in formal SLT meetings and informally day to day.'

#### **The personal side of professional growth**

A critical area in coaching is wellbeing. 'Bursars are often reluctant to acknowledge their own needs,' says Gregory. 'This can lead to overwork, poor boundaries, and personal stress.' Coaching opens the door to talk about sustainability - both in career terms and in life more broadly.

The Bursar saw real change here too: 'I need to operate strategically as well as operationally, and coaching helped me build in time to think. I now protect that space more consciously, and I've found my Head and others support that approach.'

The shift has been powerful. Today, the Bursar can be more engaged in school life - taking assemblies, mentoring Sixth Formers, running Oxbridge mock interviews. 'It's something I enjoy, and it's built stronger connections and credibility with colleagues.'

At a recent appraisal, our Bursar approached the conversation with clarity and purpose. 'I was much clearer on what I wanted to achieve and how it aligned with my future career.'

Their advice to others? 'Don't feel guilty about investing in yourself. Coaching is not about fixing something. It's about growing into the role, gaining confidence, and bringing more of yourself to the job.'

## Mentoring is still underused, often due to perceptions of self-reliance or budget hesitancy.

#### **Mentoring: Peer support with perspective**

While coaching supports deeper self-reflection and identity development, mentoring offers something equally vital: the voice of experience. Eleanor Sharman, former Bursar and Chair of ISBA, has helped shape the ISBA mentoring programme designed specifically for Bursars.

'Mentoring fills a gap,' she explains, 'It creates a trusted space for reflection and guidance, especially for those new to the role or the sector.'

The programme now includes fourteen trained and certified mentors - current and former Bursars - matched with peers from similar schools. Each mentoring relationship is shaped by the participants, with flexibility around focus and frequency.

Three themes typically emerge: managing relationships, tackling workload, and understanding the rhythms of school life. 'It can take a full year to really grasp how a school operates,' says Sharman, 'Mentoring helps build that rhythm and confidence.'

While the content is rarely technical - Bursars tend to be experts already - the benefit lies in having someone who truly understands the broader context.

Mentoring is still underused, often due to perceptions of self-reliance or budget hesitancy. But as Sharman points out, 'It's a paradox in a sector built on encouraging growth through support.'

#### **A model for development**

Together, coaching and mentoring offer a powerful support system for Bursars - whether they are new to the role, stepping into senior leadership, or seeking to sustain their impact over time.

The Bursar who shared their journey summarised the value best: 'Coaching gave me clarity and ownership of my development. It helped me grow as a leader, not just as a manager. And that has made all the difference.'



### The power of networks

Professional networks were widely cited as essential, not only for technical updates and guidance, but as spaces of emotional support, solidarity and practical problem-solving. ISBA, in particular, was praised for helping Bursars stay current, build peer relationships and feel less isolated in the role.

This was particularly valuable for those in smaller or more isolated schools. Many Bursars described informal peer support as 'vital' - offering honest advice, quick reassurance and long-term connection.

**"I know I can ask any question, and I will get help and support. The network is vital."**

**"ISBA are brilliant at keeping us informed about changes coming our way and advising on what to do."**

**"ISBA is such a valuable resource – to build up connections and receive advice. As the job becomes tougher, ISBA is of even greater value."**

**"Most Bursars are constantly struggling with remarkably similar issues to one's own and that attendance at regional group and ISBA events can therefore be so reassuring and beneficial."**

**"I am so grateful to fellow Bursars who will always answer a question, no matter how stupid, and to ISBA for all the resources, information, guidance and support."**

### Recognising the human cost

One of the clearest messages from the research was the professional isolation many Bursars feel, particularly when working alongside colleagues whose reference points are primarily educational or pastoral. For example, being the only person focused on financial sustainability can make the work feel lonely, and at times, thankless.

**"It is lonely at times but the incredible support I receive from my local Bursar network makes everything achievable."**

**"It's a very isolated role at times and few people, governors and the Head understand the full scope of the role and the competing pressures."**

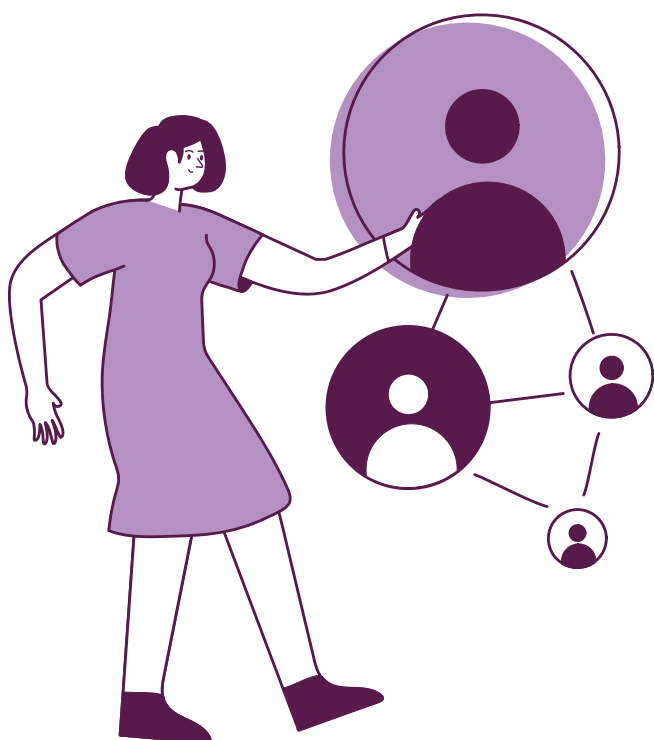
**"Support of the Bursar is improving, but it's still a role that is not understood as much as others in a school."**

While few Bursars expect praise, many suggested that even small gestures of appreciation, or regular check-ins from the Head or Chair, could have a real impact. Likewise, structured feedback or performance appraisal remains inconsistent. Despite the strategic importance of the role, perhaps Heads feel uncertain about how to review it, and governors may underestimate how far the scope has evolved.

**"I would like the Chair of Governors or Head to perhaps check-in with me every now and then and, at least, ask me how I am doing."**

### Investing in retention and resilience

Ultimately, development is not a personal luxury, it is a professional requirement. Schools that invest in coaching, mentoring, structured feedback and professional networks are more likely to hold on to talented Bursars and unlock their strategic potential. It also sends a clear message: the Bursar is a senior leader whose development and wellbeing matter as much as that of any other member of the school leadership team. ■



**PART** *five*

# In conclusion

**This report has shown the remarkable breadth, complexity and strategic importance of the Bursar role in UK independent schools today.**

Bursars are no longer confined to financial stewardship, they are organisational leaders, strategic thinkers and, often, the glue that holds multiple systems together. The effectiveness of a Bursar is forged not only through what they know or can do, but through the support structures and relationships that surround them.

Success begins long before the appointment. It depends on a careful and forward-thinking recruitment process. A process that looks beyond technical qualifications to assess leadership potential, emotional intelligence, and values alignment. Structured induction, coaching, and mentoring help new Bursars adapt quickly and effectively, especially those joining from outside the sector. And once in post, the opportunity to continue learning and connecting with peers becomes essential.

Yet, as we have seen, access to this support remains patchy. Despite the recognised need for professional development, reflective learning, and networked collaboration, many Bursars struggle to prioritise or access it. Time, resource constraints, and the self-reliant culture of the profession can all get in the way. But the cost of under-investment is clear: greater isolation, increased stress, and missed opportunities to lead with impact.

This report has highlighted five interconnected dimensions that shape effectiveness: knowledge, skills, personal qualities, the working environment, and ways of working. These dimensions reinforce one another and where one is missing or not optimised, the others are weakened. That is why effectiveness must be co-produced. It is not only the responsibility of the Bursar, but of the Head, the governing body, and the sector as a whole.

To build a sustainable model of leadership for the future, we must recognise the strategic weight of the role and design it accordingly. This means clarifying governance boundaries, investing in support teams, enabling peer networks, and strengthening leadership relationships.

When these conditions are met, Bursars describe the role as not just manageable but deeply fulfilling. They are able to contribute meaningfully to the future of their schools, to lead with clarity and confidence, and to find joy in the breadth, challenge and purpose of their work.

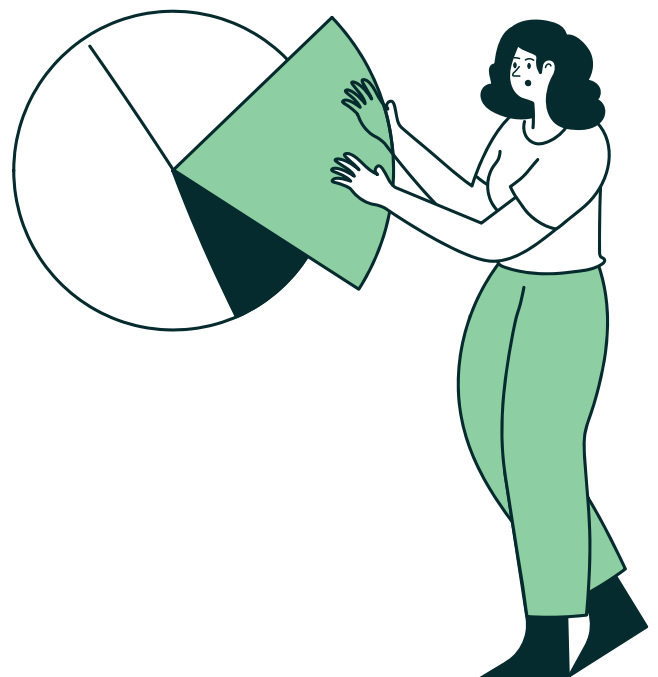
There has never been a more important time to get this right. The sector faces intense pressures and complex challenges, and the Bursar is often the person at the centre of navigating them. Yes, this is a profession under pressure, but it is also one poised for lasting impact in a new and critical way. Schools that enable their Bursars to lead, not just manage, will be stronger, more resilient, and better placed to navigate the complex future of education. The case for change is not about urgency or overdue correction. It is about opportunity: opportunity to unlock the powerful potential of what should be one of the most influential leadership roles in our schools today. ■



# Appendices

# Summary of research coverage

This appendix provides a summary of the research coverage used in researching this report. The qualitative questionnaire and discussion guide, and the large-scale quantitative survey were designed to explore both the lived experience and wider trends relating to Bursars' responsibilities, challenges and success factors.



## QUALITATIVE RESEARCH

The first phase of the research was qualitative, involving a detailed questionnaire, follow-up interviews and focus groups. This exploratory stage provided rich insights into the complexity and evolution of the role.

Participants were invited to reflect openly and at length on a wide range of themes. They could respond in prose or notes, depending on their preference. The questionnaire covered three broad areas:

- Role context and structure:
  - Professional background and route into the sector
  - School profile and governance structure
  - Variations in the shape or emphasis of the role.
- Key challenges and reflections:
  - Financial pressures, compliance, governance, HR, operations, and IT
  - Strategic development, enterprise activities, and change management
  - Most difficult experiences in recent years
  - Changes in role scope and expectations over time.
- Success factors and development:
  - Knowledge, skills and personal qualities most associated with success
  - Influences of prior experience and transitions into the role
  - Views on induction, training, coaching, and ongoing support
  - Reflections on environmental factors such as school leadership, governance, and team structures
  - Considerations for future appointments and succession planning.

This qualitative stage was used to identify themes that were then explored more widely in the quantitative phase. In addition, insights and examples drawn from these responses are used throughout the main report to bring the data to life and illustrate key points through the voices of current Bursars.

## QUANTITATIVE SURVEY

Following the qualitative stage, a quantitative survey was distributed, which generated over 300 responses from Bursars across a wide range of UK independent schools. This phase aimed to validate and deepen understanding of the themes identified in the initial interviews and written submissions. To capture the diversity of the role across different contexts, the survey collected background and demographic information including:

- Experience in role: Length of time as a Bursar and number of schools served.
- Career background: Including finance, military, education, and other sectors.
- School characteristics:
  - Size and age range (Prep, Senior, Sixth Form, All-through)
  - Boarding provision (none, some, mainly boarding)
  - Organisational model (charity/non-profit or commercially owned)
  - ISBA region.
- Scope of responsibilities: Covering finance, HR, operations, IT, strategy, marketing, international responsibilities, and multi-school roles.

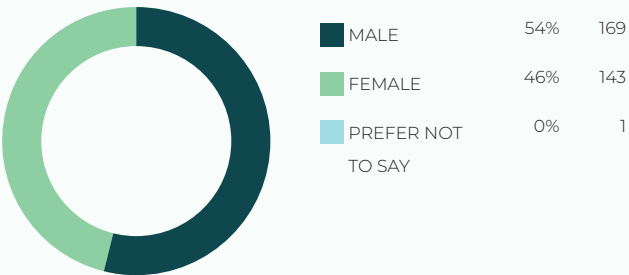
The survey examined a wide range of themes grouped under three principal categories:

- The role: positives and challenges:
  - Most fulfilling aspects of the job
  - Most difficult and time-consuming challenges
  - Areas where complexity or workload has increased in recent years.
- Success factors:
  - Knowledge requirements: Legal, financial, operational, educational, and sector-specific
  - Skills: Leadership, communication, strategic thinking, project management, and negotiation
  - Personal qualities: Resilience, calmness, clarity of thought, humour, and humility.
- Environmental factors: Governance quality, school leadership, team structures, access to advice and external networks.

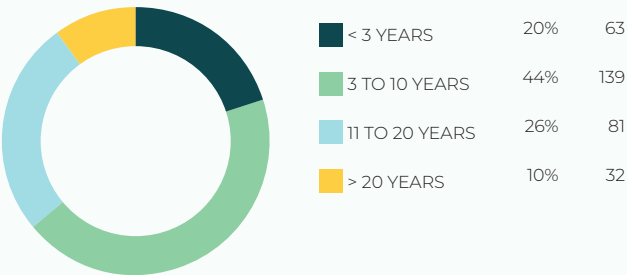
In addition to multiple-choice and ranking questions, the survey included space for participants to provide open-ended comments. These responses gave further insight into the experience of Bursars and highlighted areas of concern, need, and opportunity for the sector as a whole. ■

# Respondent profile data

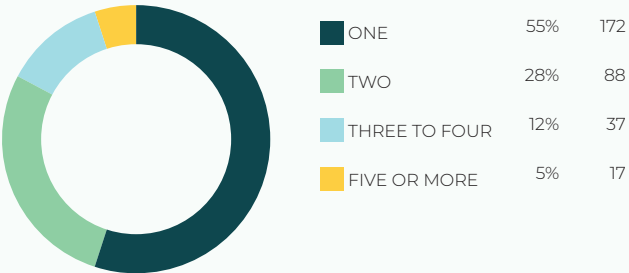
HOW WOULD YOU DESCRIBE YOUR GENDER?



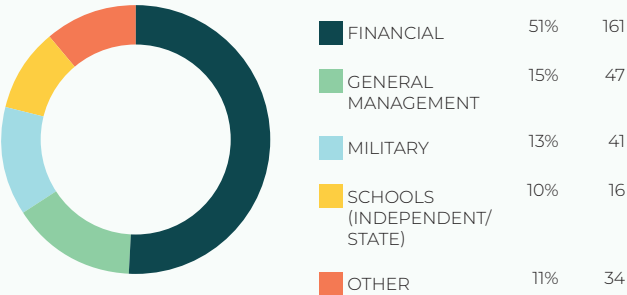
INCLUDING YOUR PREVIOUS ROLES, HOW LONG HAVE YOU BEEN A BURSAR?



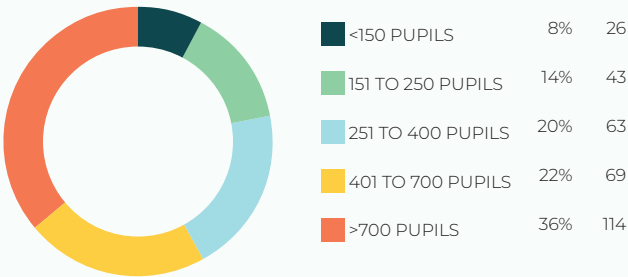
INCLUDING YOUR CURRENT ROLE, PLEASE INDICATE HOW MANY SCHOOLS YOU HAVE WORKED AT



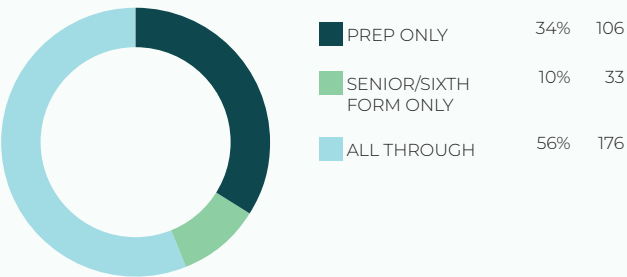
WHAT WAS YOUR MAIN BACKGROUND BEFORE YOUR FIRST ROLE AS A BURSAR?



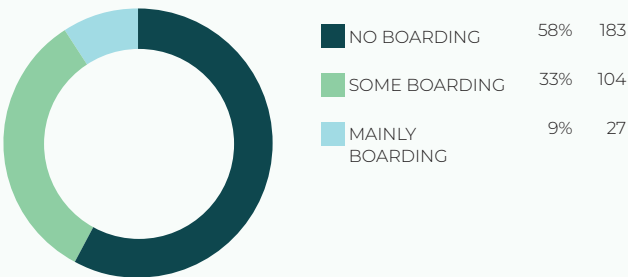
PLEASE INDICATE THE SIZE OF YOUR CURRENT SCHOOL



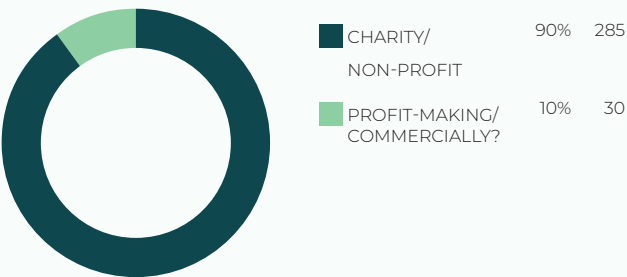
PLEASE INDICATE THE PUPIL AGE RANGE AT YOUR CURRENT SCHOOL



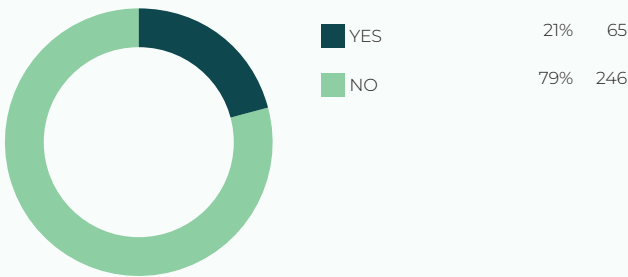
PLEASE INDICATE THE MIX OF PUPILS AT YOUR CURRENT SCHOOL



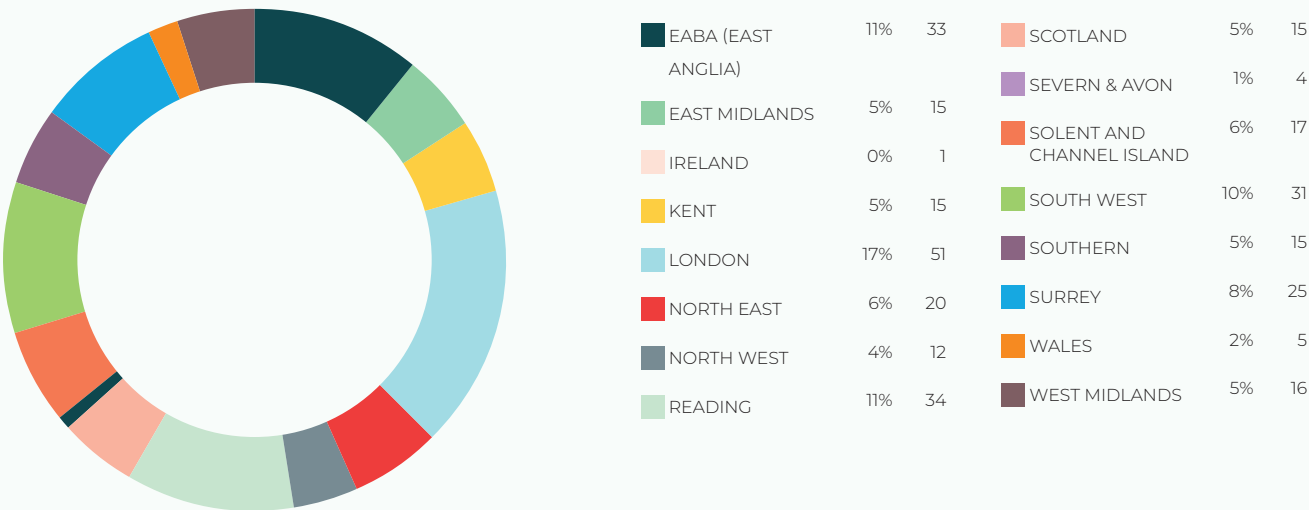
IS YOUR SCHOOL A CHARITY, NON-PROFIT OR OWNED BY A PROPRIETOR? PLEASE CHOOSE THE MOST RELEVANT RESPONSE.



IS YOUR SCHOOL PART OF A GROUP OF SCHOOLS?



IN WHICH ISBA REGION IS YOUR SCHOOL LOCATED?



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