Challenges and opportunities

- A structured approach to change ***helps to limit disruption*** to daily operations
- Factor in the reality of achieving a ***realistic timeline***
- Embrace change management as a ***core leadership discipline***

Navigating change – insights for bursars

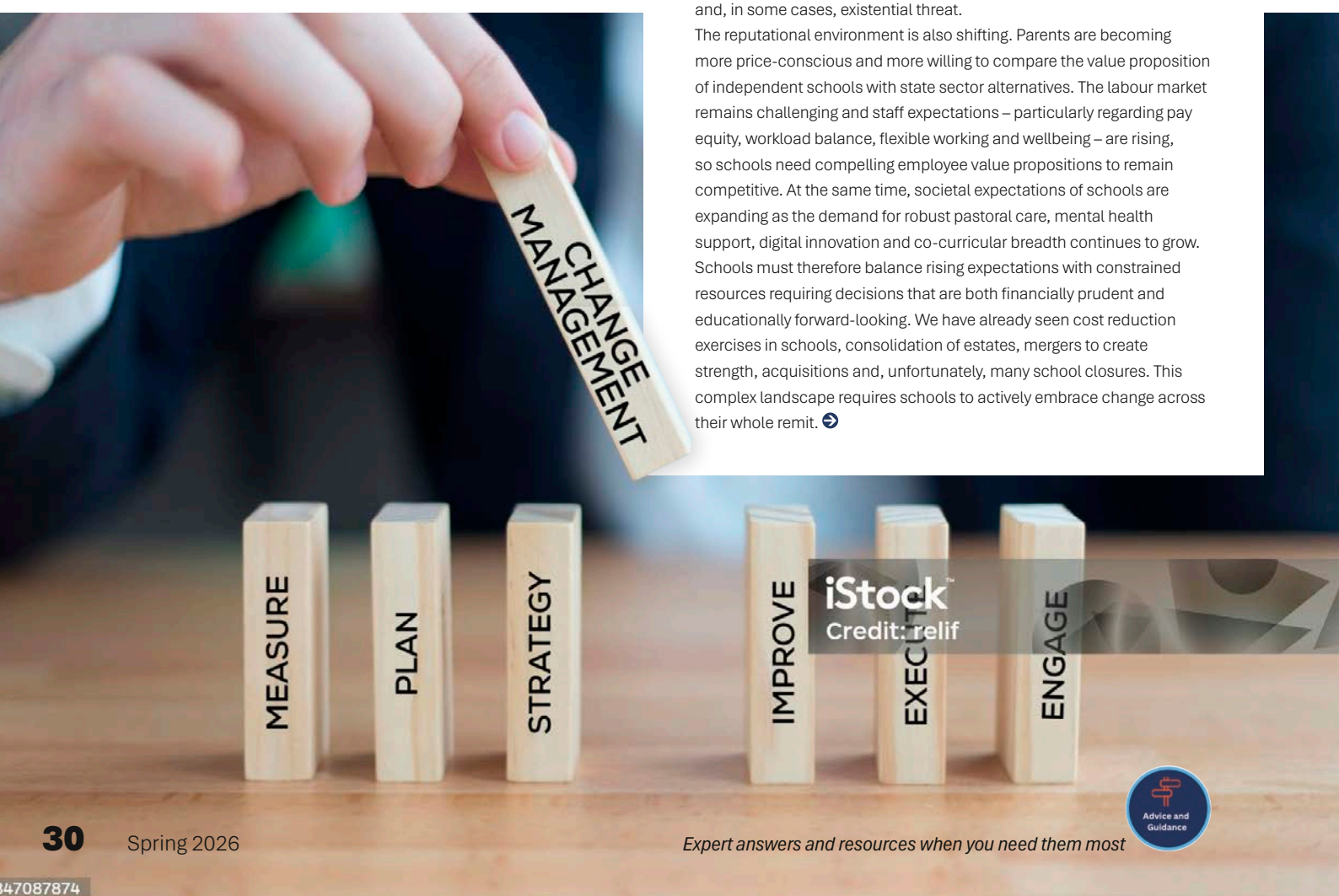
Applying structured change management principles can help schools navigate uncertain terrain with confidence and integrity.

The independent school sector is no stranger to challenges, but the combined forces of financial pressure, political change, evolving parental expectations, workforce constraints and new legislative frameworks are reshaping what it means to lead and manage an independent school. In this increasingly complex environment, bursars and senior leaders find themselves at the centre of transformation – required not only to respond to change but to actively design and guide it.

The landscape of change

While the headline issue has been the introduction of VAT on school fees, this is just one part of a broader financial rebalancing that is increasing pressure across the sector. The combined impact of VAT, the increase in National Insurance contributions and the removal of business rates relief is putting unprecedented stress on school budgets. Some families previously committed to independent education are re-evaluating affordability and as income becomes less predictable financially vulnerable schools face the risk of falling rolls, cashflow strain and, in some cases, existential threat.

The reputational environment is also shifting. Parents are becoming more price-conscious and more willing to compare the value proposition of independent schools with state sector alternatives. The labour market remains challenging and staff expectations – particularly regarding pay equity, workload balance, flexible working and wellbeing – are rising, so schools need compelling employee value propositions to remain competitive. At the same time, societal expectations of schools are expanding as the demand for robust pastoral care, mental health support, digital innovation and co-curricular breadth continues to grow. Schools must therefore balance rising expectations with constrained resources requiring decisions that are both financially prudent and educationally forward-looking. We have already seen cost reduction exercises in schools, consolidation of estates, mergers to create strength, acquisitions and, unfortunately, many school closures. This complex landscape requires schools to actively embrace change across their whole remit.



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Defining change management

Change management is the structured process of preparing, supporting and guiding individuals and teams through transitions. Effective change management focuses on the **people** elements of change, recognising that even well-designed initiatives can fail if communication is poor or employee engagement is overlooked. A robust approach to ensure a successful outcome involves:

1. PLANNING	Defining purpose, scope, risks and benefits	Through internal and external discussions, it is common practice to create a paper for the governing board to consider. This would include scoping the rationale for change, how it might be achieved, over what time frame, detailing the resources, costs and operational considerations and overall risk/benefit summary.
2. STRATEGY	Developing a strategy for the change, which includes the desired outcomes and considering the impact on processes, systems and employees	This would follow on from the board paper, giving a timeline, initial draft communication material including letters from the governing board and individual employee letters which trigger consultation. The strategy should be tailored to the project, built around the school context and current employment law requirements.
3. IMPLEMENTATION	Executing in a structured way with clarity, consultation and adaptability	This is where the proposed timetable, which details actions, accountabilities and desired outcomes at relevant stages, becomes the guide for the project team. It's important once the project 'goes live' to prioritise the project and the achievements of the relevant milestones. This demonstrates sound leadership and builds trust in the process.
4. SUPPORT	Guiding individuals through the transition by providing support, training and clear communication to help them adapt	During the implementation, various key stakeholders will encounter feedback. It is essential that the project team hears the live issues as soon as possible and have a consolidated approach to responding to situations as they occur. Regular communication with stakeholders is essential to share progress and develop the right approach to new situations as they arise. Working in collaboration with all parties is key to maintaining a cohesive consultation experience.
5. MONITORING AND REINFORCEMENT	Evaluating the change after implementation to ensure it is working as intended	For example, in a school that is going through TUPE into a larger organisation, there is often a lot of consultation and information sharing pre transfer, and it is important that the project timeline includes this phase post-transfer to facilitate a smooth transition. This is where the real integration and collaboration begins, to create one culture (if this is the goal).

What difference does effective change management make?

- **Minimises disruption:** a structured approach helps to limit disruption to daily operations and information shared in a timely manner takes the 'concern' out of a change process. A central online communication source that can be evolved during the change process works well, for example, questions and answers raised in consultation meetings can be shared quickly to reduce confusion and alleviate concerns; this allows employees to remain focused on their roles as far as possible.

- **Increases success rates:** effective change management increases the likelihood that the initiative will meet its objectives and be successfully adopted. With a clear plan and milestones, the project team can assess where they are at each point and where they need to go to next. There are always challenging periods in any change process and so it's helpful for the project team to see what they have achieved on a regular basis to help with motivation and reduce undue concern as they move towards the overall goal.

- **Addresses resistance:** it provides a framework for managing any resistance to change, which is a common obstacle. Individuals move through the 'change curve' at different times, as do groups of employee representatives. Resistance early on is a common feature and it's important to accept this as part of the process.

- **Boosts employee engagement:** by keeping people aware and informed it can build a sense of increased commitment. For example, elected representatives often learn a lot more about how a school runs operationally and this broader understanding can build richer relationships between leaders and staff. It can also provide useful feedback across the whole organisation about the project and any wider issues.

Be prepared to adapt; good consultation with staff usually results in a degree of change from the proposals initially presented.

10 key considerations in planning successful change projects

Across all types of projects, similar questions consistently arise. Addressing these early will significantly increase your likelihood of achieving the aims of your planned change as well as enabling effective briefing of all stakeholders:

1. Who should lead this project?

Having the correct knowledge, experience and approach on the project team is essential. Typically, the decision and ownership of any change process lies with the governing body and operationally, the school's senior leaders have the delegated authority to implement the change.

2. What needs to be done first?

The starting point is always clarity of vision and purpose:

- define the scope;
- develop the business case;
- gather third-party advice where necessary; and
- prepare a board paper.

3. Is this achievable with current resources?

This depends on what else is happening in school and the capacity and skill that key staff may have to support the project.

4. Do I have the correct technical expertise around me and access to it when I need it?

This depends on the requirements of the project, for pension changes, technical financial input would be required; for contractual changes, employment law advice may be required etc. Changes to pay systems may require compensation and benefits advice to avoid building up a complicated and burdensome pay structure in the longer term. Mergers and acquisition work may require estates expertise as well as legal advice for the board. Can your internal HR teams work at this strategic level?

5. How long will this project take to complete?

It is important to factor in the reality of achieving a realistic timeline, this is usually based around the practicalities of starting a project when all staff are available. Also, contractual notice periods need to be built in and worked around, for example a TPS project can take up to two terms to allow staff to understand the proposals, agree to them and then have time to make personal pension change choices. In a school merger, due diligence on the estate and the commercial legals can take more time.

6. What are the risks?

The increased cost of living makes changes in the workplace less palatable to employees. There is a risk of disengaging the workforce if change isn't handled in a fair and transparent way. In addition,



the introduction of more stringent employment legislation in the Employment Rights Bill, including ending the use of the mechanism of dismissal and re-engagement, places the school at greater risk of claims. This means that the resistance to change can be greater, employees may reach out for union support far quicker than they may have done in previous years

7. What are my legal obligations?

These may include:

- statutory consultation;
- TUPE regulations in the case of mergers and acquisitions;
- fair redundancy processes;
- equality and non-discrimination requirements; and
- appropriate documentation and governance.

8. What are the key success factors?

Create a competent team to work on the project, this may include members of the board, bursars, operations staff and third-party advisors.

Develop a strong communication plan for launch, mid-point and closure. Develop a central source of online information to ensure speed of communication and consistent messaging.

Keep stakeholders up to speed with progress by planning and executing a clear, regular communications plan through a range of different channels tailored to your audiences.

Be prepared to be agile in decision-making and implementation – small issues can become big issues very quickly if there is a failure to address matters efficiently.

Be prepared to adapt; good consultation with staff usually results in a degree of change from the proposals initially presented.

Be consistent and stick to the core rationale for change and make sure actions and decisions that follow are congruent with that objective.

9. What impact is this likely to have on staff morale?

Change will unsettle staff but if managed well the impact can be minimised. If the project moves at a fair pace, it can limit the uncertainty and help things move forward in a timely manner.

Do not underestimate the power of strong employee communications with the use of updates, online information sites and departmental meetings.

10. What are the things to avoid?

- poor business case, not fully supported by the combined leadership;
- failing to plan sufficiently and have a timeline to reach project milestones;
- inconsistency in messaging, failing to communicate in a cohesive and comprehensive manner, lack of transparency and untimely communications; and
- failure to anticipate staff concerns and overlooking the emotional impact of change.



A challenge and an opportunity

The independent schools sector is in a period of profound change. The schools that will thrive are those that accept this reality early, plan strategically, communicate transparently and embrace change management as a core leadership discipline. For bursars and senior leaders, the challenge is significant but so is the opportunity. With the right planning, skills and support to bring the whole school community successfully through a strategic change of any kind, schools can navigate uncertainty while protecting financial health, educational quality and the wellbeing of their communities.

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