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ASBA
Association of School Business Administrators

ASSOCIATE

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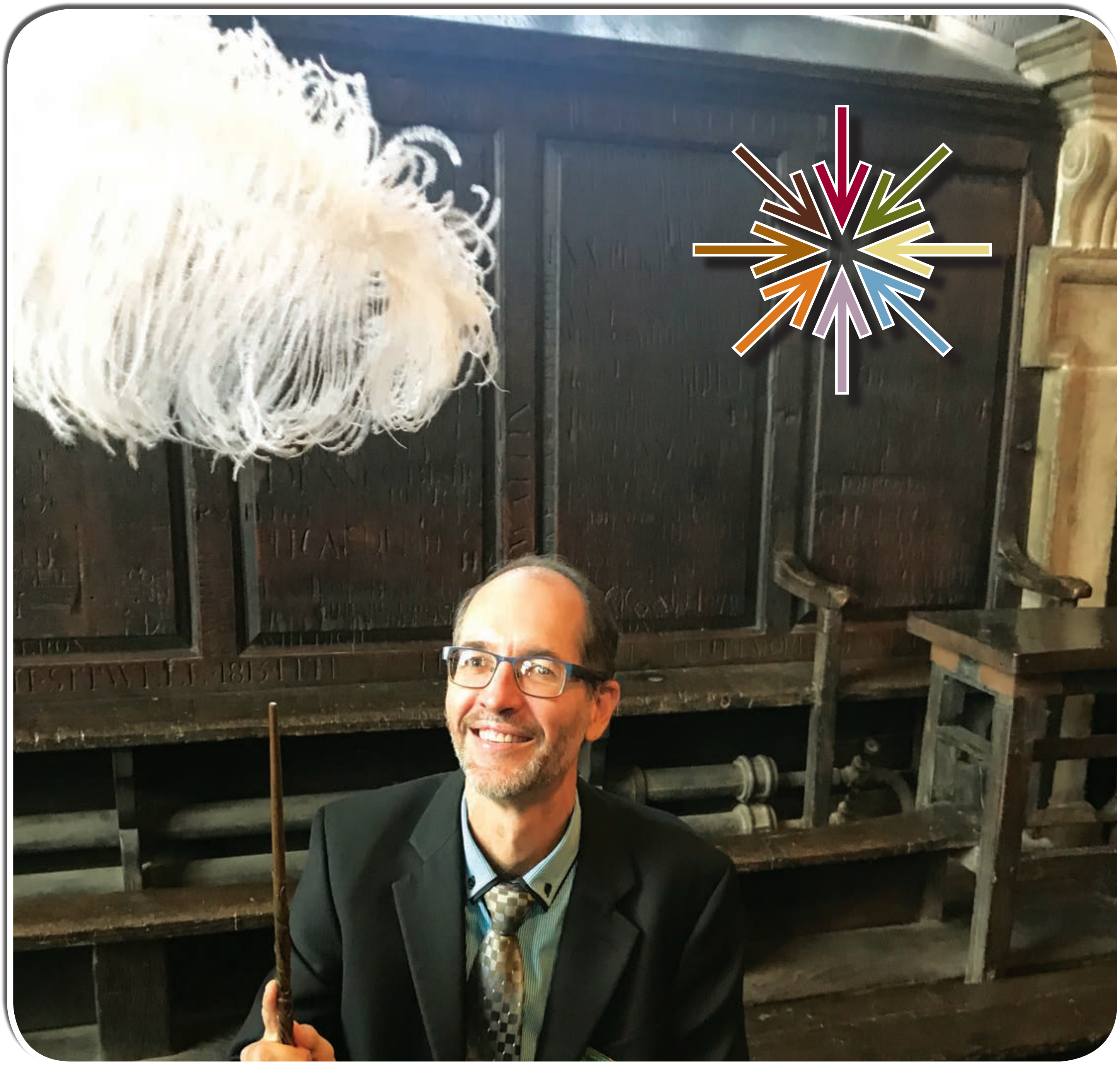

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From the Chair

LINDSAY BOVILL WAS ELECTED CHAIR OF ASBA LIMITED IN MARCH 2018 AND HAS BEEN A DIRECTOR SINCE 2012. HE IS A FORMER DEPUTY CHAIR OF ASBA LIMITED AND IS ALSO AN EXECUTIVE COMMITTEE MEMBER AND IMMEDIATE PAST PRESIDENT OF THE QUEENSLAND CHAPTER. HE CHAIRED THE ASBA 2013 NATIONAL CONFERENCE HELD IN CAIRNS, QUEENSLAND. LINDSAY IS THE GENERAL MANAGER OF ST PETERS LUTHERAN COLLEGE IN BRISBANE, QUEENSLAND, A POSITION THAT HE HAS HELD FOR THE PAST 6 YEARS.

The Board met at the Fraser Suites in Perth on the 10th – 11th September 2018. This two-day meeting included group discussion around Strategic Pillar One "Excellence in Leadership and Governance" under our Strategic Planning 2019-2021 initiatives. Our Strategic Plan is a governance model that supports excellence in corporate governance and association administration that strives to achieve innovation and continuous improvement. Strategic Planning is a regular agenda item at Board meetings and all our Directors appreciated having available time at our September two day meeting dedicated to developing a code of conduct, standardised Board reporting templates and Chapter Executive Roles and responsibilities templates.

Supporting our Chapters is a key priority for the Board and we will continue to work very closely with our Chapters as templates are developed to improve our corporate and administrative responsibilities. General meeting matters considered by the board included:

ASBA TV Education Network Webinars: Highly successful Webinar in August with 170 registrations to be followed by an October Webinar titled "The Royal Commission's Final Recommendations on Child Safety"

The ASBA2019 Mentoring Program which is an enhancement to the current Mentoring Program will match 15 pairs, mentors and mentees with members across Australia and New Zealand. It is a wonderful opportunity for our experienced members to share their valuable experience and knowledge with newer and less experienced members. I would encourage members to take up this wonderful opportunity for learning and personal growth.

The ASBA2019 National Conference to be held in Hobart 1st – 4th October 2019 is an exciting opportunity for our members across Australasia to register for this wonderful professional development opportunity to engage with colleagues and support our Strategic Sponsors and exhibitors.

ASBA ISBA Tour was a fantastic success with twenty-one members attending. I wish to thank Kathy Dickson who lead the tour in our Chief Executive Officer's absence and thank Kathy for preparing the report of the tour in this edition of the Associate.

I appreciated the opportunity, along with several other Directors to attend the ASBA WA State Conference, Can You? Can Do in Busselton on Tuesday 11th September to Thursday 13th September 2018. Myself and our Chief Executive Officer also attended the ASBA QLD Chapter Conference Future Glimpses Wednesday 6th June to Friday 8th June 2018 and the ASBA NZ Chapter Nuts and Bolts Conference in Christchurch on Monday 24th to Tuesday 25th September 2018. I was thrilled to be invited to speak at these conferences and appreciate the hard work and dedication the Chapter Conference Management Committees put into these highly regarded professional development programs. I know I can speak on behalf of fellow Directors and our CEO, we all very much enjoy networking with colleagues from our Chapters at these conferences.
The Professional and Social programs were superb; congratulations to all involved.
It is my intention over the duration of my tenure as Chair to attend as many Chapter Conferences as possible, unfortunately time constraints have prevented me from doing so this year. I always welcome and appreciate contact and feedback from members and I can be emailed at chair@asba.asn.au.

Lindsay Bovill | Chair

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Association of
School Bursars and Administrators (VIC) Inc

Association of
School Business Administrators (QLD) Inc

Association of
School Business Administrators (WA) Inc

Association of
School Business Administrators (SA&NT) Inc

Association of
School Business Administrators (TAS) Inc

Association of
School Business Administrators (ACT) Inc

Association of
School Bursars and Administrators (NZ) Inc

Cover photograph:

HUGH BRADRIDGE FROM THE HARROW SCHOOL PROUDLY BEHOLDS *THE HARRY POTTER WAND*

Attributes of a ***Financially Sustainable*** *Independent School*

GOVERNORS AND MANAGEMENT HAVE A STATUTORY AND/OR FIDUCIARY RESPONSIBILITY TO ENSURE THE FINANCIAL VIABILITY AND SUSTAINABILITY OF THEIR SCHOOLS (CORPORATIONS ACT 2001, AUSTRALIAN CHARITIES AND NOT-FOR-PROFITS COMMISSION ACT 2012). THERE IS A RESPONSIBILITY UNDER THE CONDITIONS OF COMMONWEALTH GOVERNMENT RECURRENT FUNDING LEGISLATION TO ENSURE FINANCIAL VIABILITY AND SUSTAINABILITY. STATE AND TERRITORY GOVERNMENTS ALSO REQUIRE NONGOVERNMENT SCHOOLS TO BE FINANCIALLY VIABLE.

Because financial viability is not clearly defined by government and other stakeholders it is difficult to form consistent opinions on school financial viability? I therefore set out to define the attributes in an academically rigorous manner with the hope that those attributes would be widely accepted by key stakeholders.

The assessment of financial health for not-for-profits has evolved beyond the mere assessment of financial ratios. It relies on context, trends, financial and non-financial cause and effect factors. There was a gap in the research concerning a comprehensive study of the qualitative and quantitative factors to be considered when assessing financial sustainability of independent schools in Australia. From 2013 to 2017 I completed a Master of Business (Research) through Queensland University of Technology to define the attributes of a financially sustainable independent school in Australia.

The qualitative research methodology adopted for this study included the identification of the major stakeholders who are concerned with the financial sustainability of independent schools in Australia and the carrying out face to face semi structured interviews with a sample of 17 stakeholder representatives.

The sample frame included representatives from banks, federal and state government, school owners, managers and governors, peak association, parent association, auditor and liquidator. Interviews were recorded, transcribed and analysed for common attributes.

There were six major findings from this research. First, there was common agreement between the interviewees as to which financial stakeholders were concerned with the financial sustainability of an independent school. Second, it supported the existing research that stakeholders are as interested in the nonfinancial attributes as they are in the financial attributes of independent schools when making an assessment of the school's financial sustainability. Third, the stakeholders confirmed the importance of financial attributes and in particular the need for a strong operating surplus (profit) in order to fund facility reinvestment, debt servicing and also replenish cash reserves. Fourth, Leadership and management are important attributes of financial sustainability. Fifth, the stakeholders' definition of a financially sustainable independent school identified a mixture of non-financial and financial factors.

Sixth, although there was a significant level of agreement among the stakeholders concerning the attributes of a financially sustainable independent school, there were some differences between stakeholders as to the relative importance placed on some factors.

The attributes are briefly summarized in Table 1

In the wake of the Global Financial Crisis, heightened levels of government scrutiny and accountability and a changing federal funding system, I implore independent schools to consider the findings of this important research including insights shared by the expert stakeholders interviewed. Also, you will find that the annual ASBA/Somerset Non-Government schools financial performance survey will greatly assist in assessing the financial attributes (comparative and trends) identified in the study.

"A financially sustainable independent school responds to stakeholder needs by using strengths, managing weaknesses, generating adequate operating surpluses to fund debt, reinvestment and cash reserves, identifies changing circumstances and adapts in a timely manner."

ATTRIBUTES OF A FINANCIALLY SUSTAINABLE SCHOOL

Category	More information
RATIOS AND BENCHMARKS	Trends and comparatives Identify and quantify strengths and weaknesses
CASH FLOW	Positive and stable net cash flow from operations Sufficient cashflow to fund debt and reinvestment
CASH RESERVES	Adequate buffer in event of financial shock
DEBT AND DEBT SERVICING	Function of operating surplus
SCHOOL CULTURE	Positive, honest, Innovative, forward-looking Able to adapt to changed circumstances
ENROLMENTS	Sound enrolment trends (past and future) Understand market demographics and needs
SERVICE QUALITY	Quality educational offerings and service Deliver on a value proposition
FACILITIES QUALITY AND REINVESTMENT	Safe, comfortable, challenging
STAFF	Quality and engaged staff who are change-ready
BOARD QUALITY AND GOVERNANCE	Mix of business, education and other skills Financial literacy Quality policies and procedures
STRATEGY	Adequate strategic planning, dissemination and reporting
MANAGEMENT QUALITY	Financial literacy Principal and business manager relationship Ability to adapt to changed circumstances
BUDGETING, ACCOUNTING, REPORTING	Reliable budgeting based on reasonable assumptions Trend analysis of key ratios Disciplined, timely and accurate reporting
STAKEHOLDER MANAGEMENT	Understand and meet multiple stakeholder needs Reputation management

I therefore concluded that the definition of a financially sustainable school is

"A financially sustainable independent school responds to stakeholder needs by using strengths, managing weaknesses, generating adequate operating surpluses to fund debt, reinvestment and cash reserves, identifies changing circumstances and adapts in a timely manner."

The consensus is that school sustainability is best assessed over a period of 10 years including five years of history and five years of budgeted data. But sustainability is somewhere on a continuum, it is difficult to identify when a school becomes unsustainable other than the point where they are not able to pay debts as and when due. But there are many warning signs, which if identified and actioned upon in a timely manner, should prevent financial failure.

It is not so much how financially sustainable a school is, because the least financially healthy may still be sustainable. But sustainability does turn on a school's ability and willingness to adapt to changing circumstances.

If you have any questions or if you would like a copy of the thesis, please do not hesitate to contact Somerset Education on telephone 1300 781 968, www.somerseteducation.net or email survey@somerseteducation.net

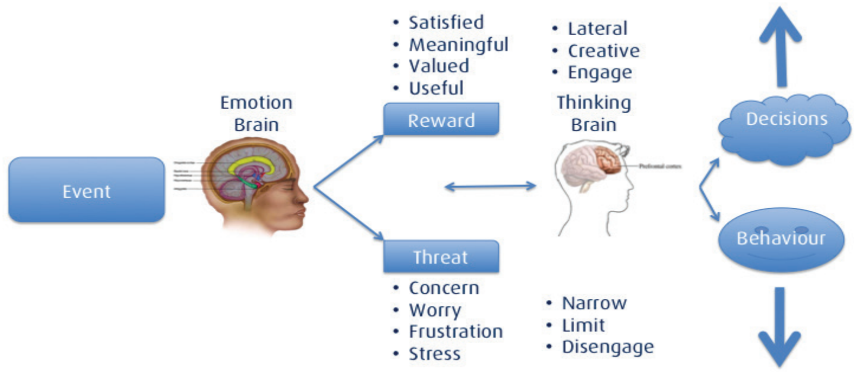
John Somerset | Somerset Education

Technical Update

The Science of ***Emotionally Intelligent*** *Leadership*

In a recent report published by the World Economic Forum called 'The Future of Jobs', focus is placed on the current disruptive changes to business models and the skills that will be required to meet the challenges of the future economy. In their analysis the skills associated with being emotionally intelligent in the workplace will be a top ten job skill by 2020. More broadly we also know that the skills associated with being emotionally intelligent in our behaviour are hard to recruit and hard to train. So what is emotional intelligence and how will this impact the future leadership challenge for school Bursars and Business Managers.

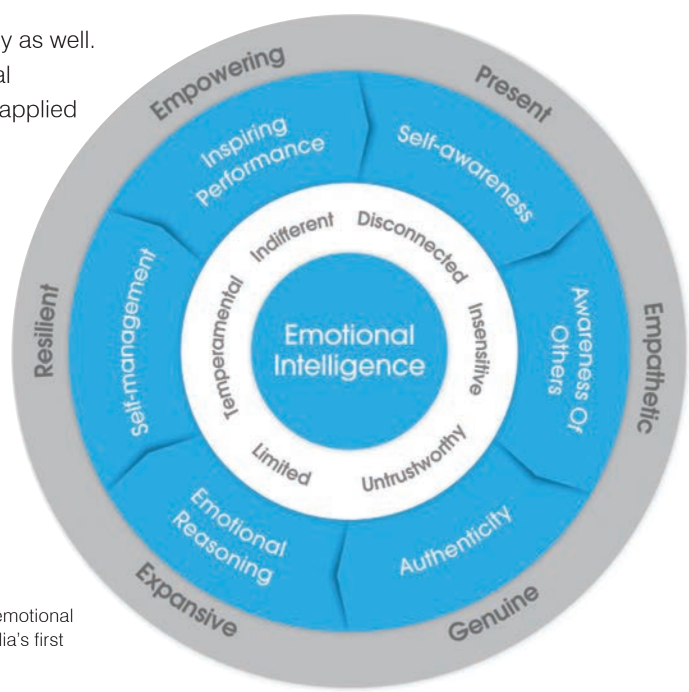
Let's begin by looking at the neuroscience of emotional intelligence. Neuroscience, the study of the biological mechanisms of the brain, has shown that whenever an event around us occurs (such as the way someone is talking to us in a meeting), the first thing that happens is our so-called Emotional Brain, that involves structures such as the Amygdala, tags that event as either a Reward or a Threat; or Friend or Foe. The job of the Emotional Brain is to make very quick, unconscious determinations about whether something or someone is safe or not. The tag, which is in fact an emotion, is communicated to the so-called Thinking Brain that involves structures such as the PreFrontal Cortex. The pre-frontal cortex is involved in helping us determine good from bad and better from best. It helps us anticipate behaviour and determine the best behavioural response to make to events.



Neuroscience has also shown us that positive emotions tend to enhance the functioning of our prefrontal cortex having a 'broaden and build' effect. That is, positive emotions help us think more openly, creatively and laterally. With positive emotions, we tend to be more open to new ideas. We also tend to think more deeply about issues and see more options. Positive emotions also increase dopamine levels that are important for interest in things and learning. Negative emotions conversely limit the functioning of our prefrontal cortex narrowing our thinking and limiting our interpretation of events. Negative emotions tend to diminish our cognitive resources. Thus, we can become biased in our views, lose our capacity to objectively evaluate situations and conceptualise our best responses to them. You may have experienced this in a verbal conflict with someone where you felt threatened and thought about all the best or 'smartest' things to say once you'd walked away from it.

While the effects of emotions are obvious when we are consciously experiencing them (e.g., we do our best thinking when we feel relaxed and commonly do things we later regret when angry at work), emotions are constantly and powerfully affecting our decisions, behaviour and performance unconsciously as well.

So what does emotional intelligence look like when applied to leadership? Emotionally intelligent leadership competencies reflect what leaders do with their underling skills and experiences to do with emotions in the leadership of people. The Genos model of emotionally intelligent leadership competencies is shown to the right.



[1]Genos International are a company that specialise in the assessment and development of emotional intelligence and developed Australia's first model of emotionally intelligent leadership competencies.

SELF-AWARENESS = The Aware Leader

Self-Awareness is about being aware of the behaviour you demonstrate, your strengths and limitations, and the impact you have on others. Leaders high in this skill are often said to be present rather than disconnected with who they are.

Aware Leaders

- Understand the impact their behaviour has on others.
- Are aware of their strengths and limitations.
- Ask others for feedback on their leadership.
- Respond effectively to feedback provided to them.
- Are consistent in what they say and do.
- Behave in a way that is consistent with how they expect others to behave.
- Demonstrate awareness of their mood and emotions.

AUTHENTICITY = The Genuine Leader

Authenticity is about openly and effectively expressing oneself, honouring commitments and encouraging this behaviour in others. It involves appropriately expressing specific feelings at work such as happiness and frustration, providing feedback to colleagues about the way you feel, and expressing emotions at the right time, to the right degree and to the right people. Leaders high in this skill are often described as genuine whereas leaders low in this skill are often described as untrustworthy.

Genuine Leaders

- Are open about their thoughts, feelings and opinions.
- Express thoughts and feelings in a way that is sensitive to those of others.
- Facilitate robust, open debate.
- Are open and honest about mistakes.
- Honour commitments and keep promises.
- Encourage others to put forward their thoughts, feelings and opinions.
- Respond effectively when challenged.

AWARENESS OF OTHERS = The Empathetic Leader

Awareness of others is about noticing and acknowledging others, ensuring others feel valued and adjusting your leadership style to best fit with others. Leaders high in this skill are often described as empathetic rather than insensitive to others and their feelings.

Empathetic leaders

Make others feel appreciated.

- Adjust their style so that it fits well with others.
- Notice when someone needs support and respond effectively.
- Accurately view situations from the perspective of others.
- Acknowledge the views and opinions of others.
- Accurately anticipate responses or reactions from others.
- Balance achieving results with others' needs.

EMOTIONAL REASONING = The Expansive Leader

Emotional reasoning is the skill of using emotional information (from yourself and others) and combining it with other facts and information when decision-making. Leaders high in this skill make expansive decisions whereas leaders who are low in this skill often make more limited decisions based on facts and technical data only.

Expansive leaders

- Consult others in decision-making.
- Explain the rationale behind decisions made.
- Involve team members in decisions that affect your work.
- Consider issues from multiple perspectives.
- Take the bigger picture into account when decision-making.
- Reflect on feelings when decision-making.
- Make ethical decisions.

SELF-MANAGEMENT = The Resilient Leader

Self-Management is about managing one's own mood and emotions; time and behaviour; and continuously improving oneself. This emotionally intelligent leadership competency is particularly important. Leaders high in this skill are often described as resilient rather than temperamental in the workplace. The modern workplace is one of high work demands and stress, which can cause negative emotions and outcomes.

Self-Management is important in leadership because:

- A leader's mood can be very infectious and can therefore be a powerful force in the workplace, one that can be either productive or unproductive.
- This skill helps leaders be resilient and manage high work demands and stress.
- To achieve, maintain and enhance success leaders, need to pay conscious attention to the way they manage time, how they behave and to continuously improve how they lead others.

Resilient Leaders

- Manage their emotions effectively in difficult situations.
- Demonstrate a positive, energising demeanour.
- Manage their time effectively.
- Learn from mistakes.
- Keep up to date with industry trends and market conditions.
- Strive to improve their own performance.
- Quickly adapt to new circumstances.

Technical update (continued)

INSPIRING PERFORMANCE = The Empowering Leader

Inspiring performance is about facilitating high performance in others through problem solving, promoting, recognising and supporting others' work. An individual's performance can be managed with key performance indicators; however, research has shown that this 'compliance' style often fails to drive discretionary effort and high performance. Leaders who adopt a more inspiring style often **empower** others to perform above and beyond what is expected of them.

Empowering leaders

- Provide useful support and guidance.
- Provide constructive feedback on behaviour and performance.
- Help team members understand their purpose and contribution to the organisation.
- Notice inappropriate behaviour in others and respond effectively.
- Maintain a positive work environment.
- Help facilitate team member development and career advancement.
- Recognise others' hard work and achievements

MOST EXCITINGLY WE KNOW THAT THE SKILLS ASSOCIATED WITH BEING EMOTIONALLY INTELLIGENT IN OUR BEHAVIOUR CAN BE DEVELOPED. BEING REFLECTIVE, SEEKING FEEDBACK FROM OTHERS AND TAKING STEPS TO BETTER UNDERSTAND THE IMPACT OUR BEHAVIOUR HAS ON OTHERS ARE IMPORTANT FIRST STEPS IN AN EMOTIONAL INTELLIGENCE DEVELOPMENT JOURNEY.

Tiwi College 10 years on...

2018 MARKS THE 10 YEAR ANNIVERSARY FOR TIWI COLLEGE. A REMOTE INDIGENOUS BOARDING SCHOOL.

Tiwi College officially opened early in 2008. A lot has changed during this time but there has been one overwhelming vision that has remained from when the elders of the Tiwi Islands came together all those years ago. This vision has been to deliver a quality education run by Tiwi, for Tiwi on Tiwi country. The people who have lived on

the Tiwi Islands for at least 50,000 years understand a very modern truth: that the way out of disadvantage is through education.

The school began with around 40 students enrolled with fairly poor attendance but gradually each year the school has been growing in numbers and in regular student attendance. As we embark on the 10th year of the school's history we will make another step forward in quality education for the young Tiwi as we open another young women's class and another young men's class. The school now provides quality education in the Classroom, Family Group Homes and Academy for over 100 students.

www.tiwicollege.com

FOLLOWING A RECENT APPLICATION SUBMITTED TO THE AUSTRALIAN CHARITIES AND NOT-FOR-PROFITS COMMISSION (ACNC),TIWI COLLEGE LOCATED IN A REMOTE PART OF AUSTRALIA WAS APPROVED TO BE A PUBLIC BENEVOLENT INSTITUTION (PBI).

The school, focused upon educating Aboriginal members of its local community, was previously registered as a charity for the purpose of advancing education.

Becoming a PBI has huge implications for any organisation, especially those employing a large number of staff. The school therefore becomes exempt from Fringe Benefits Tax (FBT) for benefits provided to each employee up to a total grossed-up value of $30,000. The school also becomes a deductible gift recipient (DGR), therefore ensuring that donations of over $2.00 to the school can be tax-deductible. Importantly, these funds can be used by the school for all of its operations and not just e.g. for scholarships or building maintenance.

This incredible tax benefit which is not enjoyed by most schools in Australia is due to the ACNC's definition of PBI. Regularly, schools are not PBIs. However, the ACNC Commissioner's interpretation statement regarding PBIs clarifies, at paragraph 5.3.2 that:

"An organisation with a purpose of addressing Indigenous disadvantage will ordinarily be considered to be providing assistance to "people in need". To qualify as a PBI, the organisation must provide services targeted at those needs."

A further ACNC interpretation statement regarding Indigenous charities confirms that the ACNC "recognises the unique situation of Australia's Indigenous peoples and recognises their disadvantage."

For the purposes of eligibility to be registered as a charity, "an organisation with the purpose of addressing Indigenous disadvantage is accepted as coming within the first head of charity: relief of poverty or impotence, depending on the circumstances." An organisation is able to address this disadvantage through providing services such as health, welfare or education services. Specifically, the interpretation statement confirms that disadvantage may be addressed in the form of a bi-lingual school. The implication of the current regime is that organisations that are working specifically with Aboriginal peoples or Torres Strait Islanders may be able to become PBIs and enjoy the consequent tax benefits. This situation may arise for organisations, such as schools, that may not be recognised as PBIs for work performed with other communities.

Tiwi College would like to say a big Thank you to Tisher Liner FC Law who helped them achieve their goal.

MENTOR

DES HARDIMAN

When I retired from Bursaring at the end of 2015 after serving in this great industry for 30 years, I knew there would be no shortage of things to do – including some very part-time consultancy work and plenty of volunteering requests. When the offer to consider the ASBA Mentoring Program crossed my screen last year, I jumped at the opportunity.

I was afforded great support from ASBA (then BAWA) members when I started as a raw 27-year-old at Trinity College in 1985, and that collegial strength has permeated through the Association both at State and National level ever since.

I saw an opportunity for the 'wisdom of experience' to perhaps be of some help again, as I had the opportunity to pass onto the next generation.

The on-line training course – The Art of Mentoring was a very appropriate and easy to follow course over 5 modules covering Relationship Building, Mentoring Styles and practical tips and process. It was made clear that the role is not coaching, but mentoring; not problem solving but personal advice; not solutions based but teaching.

After having passed the 'exam', I was partnered with Katrina Sephton the relatively new Finance Manager at Seton College – 25 kms South of Perth. I did know Katrina from her previous employ and her boss – Peter Farrer-Smith the Business Manager! They seemed both pleased to have me on board to assist and mentor where needed.

After an initial exchange of details and expectations of the program, we were able to agree on the process, the specific needs and goals, the logistics and frequency of communication.

We met a couple of times, but basically either one of us would flick an email to touch base and start a conversation. It was more about guidance and support and not pushing any personal agenda.

Without going into specifics, the range of topics is as varied as either the Mentor or Mentee wishes to take it. One component of Katrina's load at the time was to fit some study in with work and family life and where that may take her in the future. So that offered another opportunity to balance the academic theory she was learning a with a practical sounding board.

I commend ASBA Ltd for putting some structure behind the initiative. It continues the maturity and professionalism of the Association. I urge all States to continue to offer support to new members whether it be a simple buddy match-up at State level or the more formal mentoring appointment.

Perhaps as members retire from their schools they could consider the Mentoring Program. With the pending EXIT of BABY BOOMERS from the workforce we have a responsibility to let the next generation know what it was really like!

MENTEE

"Mentoring is is a two-way relationship, providing value and meaning to both parties"

I have the found the ASBA 2018 Mentoring Program an excellent initiative by ASBA to assist in the development of future Business Managers.

I feel very fortunate to have benefitted from my mentor's (Des Hardiman) 30 plus years' knowledge and experience not only to ASBA, but in my case specific to the Catholic School sector in WA as well.

A real love of his career and enthusiasm for the role of education in human development and society were evident in our first meeting, instilling a higher transcendent purpose and meaning to my role. School Business Administration by remote correspondence.

Des provided a valuable, practical dimension to the theoretical aspects of my studies, enhancing my knowledge of Federal, State and Catholic sector specific requirements and application 'in the real world'.

I valued his openness and humility when sharing past experiences and honest direct feedback. Des examined many aspects around funding requirements, contract and project management and, where necessary, challenged my thinking.

On a personal level, he also stressed the importance of maintaining work- life balance for longevity in a professionally demanding role.

The book provided by ASBA – Make Mentoring Work, assisted in a better understanding of the role of the Mentee and Mentor relationship. A challenge for me initially was my confusion around the distinction between 'mentoring' vs a 'technical training' role. I realised Mentoring is much more involved at a macro level instead of instructional. It is a two-way relationship, providing value and meaning to both parties.

Technical Update

They might work on their own, but they can't be alone.

The challenge of managing ***lone workers*** *at Schools*

There seems to be no letup in regulatory change and we know that many Managers are clearly experiencing regulatory fatigue and overload in the face of ever-changing and growing regulations. A 2016 compliance report by Thomson Reuters reported that almost 70% of businesses are expecting regulators to publish even more information in the coming year, with 26% percent expecting significantly more regulatory requirements.

The issue of managing lone workers is yet another significant legislative requirement in workplace management and has particular relevance to the School industry. Whilst the term 'lone worker' is not always a familiar one in the School industry, it is quickly becoming more well-known in response to workplace health and safety legislation and many a Manager is becoming more proactive in all forms of worker safety and employee protection.

Who is considered a Lone Worker

It's really as simple as its name sounds. Lone workers are considered those who work by themselves and/or work on site with only limited support arrangements, which therefore exposes them to risk by being isolated from the usual back-up support. To put a little bit more context to it, a lone worker is anyone who carries out work out of eyesight and/or earshot of colleagues and employers.

Lone workers present their own unique worker safety needs. They face environmental and safety risks, some more than others based on their job role and work location.

- Ground Staff
- Cleaning Staff
- Maintenance Staff
- Outdoor Education Staff
- Teachers

The legislation

The legislation now provides a specific definition that describes remote or isolated work – In relation to a worker, it means, "work that is isolated from the assistance of other persons because of location, time or the nature of the work."

The WHS legislation also specifically states the obligations of Managers to manage the risks associated with isolated workers – " A person conducting a business or undertaking must manage risks to the health and safety of a worker associated with remote or isolated work," and "in minimising risks to the health and safety of a worker associated with remote or isolated work, a person conducting a business or undertaking must provide a system of work that includes effective communication with the worker." The penalties range between $6,000 and $30,000.

"Lone workers are considered those who work by themselves and/or work on site with only limited support arrangements, which therefore exposes them to risk by being isolated from the usual back-up support"

COMMON LONE WORKER TYPES IN THE SCHOOL INDUSTRY

Every School will have lone workers in their team. In some situations, a worker may be alone for a short period of time, while in other situations they may be on their own for most of the day in a remote location. Workers at Schools may work remotely or in isolation if they:

- physically work alone, for example, at night in the building or early Saturday or Sunday morning preparing the grounds for play;
- work separately from others, for example, outdoor education staff or teachers preparing classes.
- work outside normal working hours, for example, starting early or finishing late;
- work shift work or engaging in night work like cleaning;
- work unsupervised – School Senior Management
- work on a reduced roster, for example, casuals.

WHAT RESPONSIBILITIES DO LONE WORKERS HAVE?

The employer holds the main responsibility for protecting the safety and health of lone workers. Nonetheless, lone workers themselves have a responsibility to help their employer fulfil this duty, and they must:

Take reasonable care to look after their own safety and health and the safety of others in the workplace

Co-operate with their employer's safety and health procedures

Use tools and other equipment properly, in accordance with any relevant safety instructions and training they have been given

Not misuse equipment provided for their safety and health

Report all accidents, injuries, near-misses and other dangerous occurrences

WHAT ARE SOME OF THE PHYSICAL RISKS OF LONE WORKERS

It is important to understand the physical capabilities of the employee, volunteer or contractor who is working remotely. This includes their level of fitness required to perform the proposed duties. Some questions you can ask include:

Has the person had training to prepare them for working alone and in remote locations;

If plant and equipment is involved, is the person competent to use the equipment and have they been deemed competent under the new verification of competency requirements;

Is the worker able to make sound judgments about their own safety;

Is the person physically capable of completing all work activities alone;

Are there any pre-existing medical condition that may increase risk.

THE RISK THAT FATIGUE PRESENTS TO LONE WORKERS

Safework NSW reports that fatigue is mental or physical exhaustion that prevents a person from performing work safely and effectively. It is more than feeling tired and drowsy—it is a physical condition that can occur because of prolonged exertion, sleep loss and/or disruption of the internal body clock and is a critical factor in managing lone workers.

Fatigue can be caused by factors that may be work-related, lifestyle-related, or a combination of both, and it can accumulate over time. Examples include:

- too little or poor-quality sleep
- working at times when you would normally be asleep
- carrying out mentally or physically demanding activities
- poor nutrition and/or inadequate hydration
- effects of alcohol and/or other drugs
- driver or operator fatigue

Only sleep can cure fatigue. Sleep debt is cumulative and must be repaid.

WHAT CAN MANAGER DO ABOUT MANAGING LONE WORKERS

The most important worker safety practices for the lone worker to keep in mind all involve proactive and preventative approaches. This will involve information, training, instruction and communication.

Workers need training to prepare them for working alone and in remote locations. This may include training in dealing with potentially aggressive people, using communications systems, administering first aid, obtaining emergency assistance, activity-based risk assessment.

It is important to identify all unique, individual risks that your lone workers may face and create an action plan for how they and the business will react should an incident arise. This can be achieved through the development of a Lone Worker Policy that includes a Lone Worker Risk Checklist and communication protocols.

COMMUNICATING WITH LONE WORKERS

Manager and those responsible for the safety of the lone worker should establish a system that allows them to check in with their workers and keep track of their location as often as possible. Good practice for managing remote workers should include having a schedule of regular contact or communication with the worker to someone who is in a position to raise an alarm can do so if there is a communication failure. The frequency of communications and the actions to be taken if a communication attempt fails should also be developed and implemented.

(continued P14)

The challenge of managing ***lone workers*** *at Schools*

LONE WORKER
RISK MANAGEMENT
CHECKLIST

The lone worker will always have unique worker safety needs due to the circumstances of their job role and it requires careful assessment that considers: -

The length of time the person may be working alone

The time of day when a person may be working alone

Communication

The location of the work

The nature of the work

The competencies and characteristics of the person who is to work alone.

By considering the questions below and conducting a hazard identification and risk assessment in consultation with workers, you can identify the issues relevant to your unique working environment and take action to limit the risk of an incident occurring.

ASSESSMENT CRITERIA	YES/NO	CONTROLS
THE LENGTH OF TIME THE PERSON MAY BE WORKING ALONE		
Consider how long the person would need to be alone to finish this job and then answer this question – Is that a reasonable time for that person to be alone?		
Is it reasonable or necessary for the person to be alone at all?		
Is it lawful for the person to be alone? For example, confined spaces or hazardous zones (e.g. cellar or chemical store, or remote area of course).		
THE TIME OF DAY WHEN A PERSON MAY BE WORKING ALONE		
Is there increased risk at certain times of day? (burglaries or armed intruders or using plant and equipment in dark conditions)		
COMMUNICATION		
Does the lone worker have access to communication when working alone?		
Is voice communication essential for the safety of the person?		
Has the communication system been tested to ensure it will work properly in all situations?		
If communication systems are vehicle-based, are there arrangements in place to cover the person when they are away from the vehicle?		
If communication systems are office-based, are there arrangements in place to cover the person when they are away from their desk or the office?		
Is there a regular check-in system or protocol in place when workers are working alone?		
THE LOCATION OF THE WORK		
Is the work proposed to be undertaken in a remote or isolated location?		
Does the work involve using a vehicle or other plant and equipment?		
Is the vehicle fitted with emergency supplies, such as adequate drinking water or a first aid kit?		
Will the person be required to leave their vehicle for long periods of time?		
If first aid equipment is vehicle-based, are arrangements in place to cover the person when they are away from the vehicle?		
Is the lone worker trained in first aid?		
THE NATURE OF THE WORK		
Is there adequate information and instruction for the person to be able to work alone safely?		
Is there a Safe Work Procedure in place?		
Is equipment and machinery maintained so that it is safe to use?		
Is there high-risk work involved? For example, heights, electricity, hazardous chemicals or equipment, working near waters, working on steep slopes, counting cash/money/takings?		

ASSESSMENT CRITERIA	YES/NO	CONTROLS
THE NATURE OF THE WORK		
Is fatigue likely to increase risk (for example, with long hours driving a vehicle or operating machinery)?		
Is there an increased risk of exposure to violence or aggression when workers are alone?		
Can environmental factors affect the safety of the worker? For example, is the person likely to be exposed to extremes of temperature?		
Is there risk of attack by an animal, including reptiles, insects and water creatures?		
Is there an effective system for checking that all protective clothing and equipment and emergency equipment is packed and in good working order?		
Are there procedures for regular contact with the person who works alone?		
If the person is working inside a locked building, will emergency services be able to gain access if the person is unable to let them in?		
THE COMPETENCIES AND CHARACTERISTICS OF THE PERSON WHO IS TO WORK ALONE		
Are you aware of anything in the person's ethnic, cultural or religious background that is likely to increase risk if the person works alone. For example, long periods of fasting where the lack of food and water intake may increase the risk of ill health in very hot weather.		
Is there anything that would interfere with the person's ability to contact someone in an emergency? Are there factors relating to the person's age that are likely to increase risk?		
Is the person's general behaviour and level of maturity appropriate to allow them to work alone? Is the person physically capable of completing all work activity alone?		
Are you aware of a pre-existing medical condition that may increase risk?		
Is the person likely to make sound judgements about their own safety and about protecting the environment?		
Is the person likely to cope in unexpected and stressful situations?		
Has the person had training to prepare them for working alone and, where applicable, in remote locations? For example, training for first aid, relevant administrative procedures, vehicle breakdowns, communications systems, evacuation, armed intruder training.		
THE COMPETENCIES AND CHARACTERISTICS OF THE PERSON WHO IS TO WORK ALONE		
Is there anything else that applies to your situation that is likely to increase risk for the person who works alone?		
Has the epar Take 3 Assessment been completed?		
Was the outcome of the Take 3 Risk Score Low or Medium Risk?		

CONCLUSION

The management of lone workers will undoubtedly require extra risk-control measures as they must not be at more risk than other employees. As a Manager with lone workers, the precautions you initiate should take account of normal work as well as any foreseeable emergencies.

The best working alone risk control that I'm aware of is to not work alone. Whilst this may be impractical in the turf management sector, many businesses have implemented a No Working Alone Policy and this eliminates the lone worker risk altogether. Whilst working alone isn't ideal, the demands of working in the golf industry will necessitate that from time to time employees, volunteers and even contractors will be working alone on your site. If so, you must take all reasonable steps to reduce the risks.

Nathan Tovey| Area Manager

epar connect

ASBA/NAB Social Leadership Program ***Scholarship Winner***

MADELEINE COMPION | ABBOTSLEIGH

THE DAY STARTED OUT AS ANY OTHER DAY…EXCEPT THAT I HAD TO TAKE THE TRAIN TO SYDNEY CBD TO ATTEND THE ASBA/NAB SOCIAL LEADERSHIP PROGRAM 2018, PRESENTED BY PROFESSOR KASH RANGAN OF THE HARVARD BUSINESS SCHOOL. WHAT A GREAT PRIVILEGE IT WAS TO ATTEND THIS PROGRAM!

The room was filled with fellow colleagues and philanthropists, all of us there with the same purpose, the same frame of mind, eager to learn from Prof Rangan and our peers. How do we improve and enhance our organisation's scalability to have an even greater impact within our immediate communities?

Prof Rangan is a captivating presenter, with a passion for what he does. He knows how to keep the audience engaged and encouraged input from everyone. In true 'Harvard style', we learnt by studying two case studies, 'Kaboom! Play at scale' and 'Year Up: A Social Entrepeneur Builds High Performance'. Each organisation faces different challenges at different times, therefore by examining case studies, parallels and similarities can be identified, and solutions can be brainstormed together.

The program focused on aligning your organisation's mission, strategy and internal performance in order to scale your organisation and have maximum impact.

During the course of the program, I realised that we in the not-for-profit sector underestimate the importance of setting a clear and meaningful mission, a mission that will give the organisation a direction. Let's face it, as leaders of schools, we are doing our best to ensure quality education for our students, to keep the current infrastructure in pristine condition, raising funds for new facilities and learning spaces.

However, we have a bigger dream, a greater mission: a dream that the door to quality education is open for each child in Australia, that education should not be a privilege, but rather a right.

At Abbotsleigh, we believe that every girl is amazing and can achieve great things. However, how do we ensure that we stay on track with empowering our girls, how do we measure our success and how do we ensure that our learning methods are empowering our girls to be world citizens?

One of our drivers is to create a positive social impact – creating a better tomorrow, today. Abbotsleigh encourages our girls to act now. We empower girls to make a real difference. Learning to serve and inspire the community, our girls become strong global citizens and courageous, socially responsible leaders.

To embed the drivers in ourselves, we need a clear plan and strategy. Prof Rangan noted that there is a difference between an 'operational mission' and an 'aspirational mission'.

An operational mission gives an organisation direction for the long term, focuses effort, sets tangible goals and provides a platform to build strategy. It can be measured. Mission with a capital 'M'.

An aspirational mission is defined as the overall dream of the organisation, the dream to make the world a better place. Mission with a small 'm'.

Both Mission and mission have to work cohesively and form the strategy for transformational impact.

Key learning areas to build a strategy for IMPACT:

- Derive a meaningful Operational Mission.
- Build a robust theory of change – learn fast, fail forward and adapt to Piece together the operation components into a cohesive strategy.
- Build an appropriate measurement model.
- Continuously align strategy with the Operational Mission.
- Calibrate for Impact-align with aspirational mission.

'Education is the most powerful weapon which you can use to change the world.'

Nelson Mandela

ISCA Update

NSRB Review *of the* SES Score Methodology

On 20 September, 2018 the Prime Minister, the Hon Scott Morrison MP, and the Minister for Education, the Hon Dan Tehan MP, announced that the Australian Government would be accepting all six recommendations of the National School Resourcing Board's (NSRB) review of the SES score methodology.

The Australian Government's response to the review states that it will, "implement new, improved arrangements to determine the capacity of a school community to contribute to the operation of nongovernment schools."

The response announced that from 2020 SES calculations will be determined using a direct income measure based on the median income of parents or guardians that will be determined through linkage of personal income data and residential address data collections. The Australian Government's response claims this is a more targeted and accurate measure that will ensure funding flows to the schools that need it the most.

The implementation of the new direct income measure will see the government provide an additional $3.2 billion in funding for the non-government sector during the transition to the new arrangements from 2020 to 2029.

Based on ISCA's current understanding of the new measures announced, the following is a summary of those arrangements:

ARRANGEMENTS FOR 2019

Interim funding arrangements that were in place for 2018 will be extended to 2019. This involves an additional $170.8 million in funding for 2019 for non-government schools.

Schools will receive funding based on their "best of" 2011 or 2016 SES score. The more favourable year will be calculated and used automatically by the Department of Education and Training.

Funding in 2019 will continue to have a guaranteed three per cent indexation for individual low or negative growth schools.

While the system weighted average SES scores for systems will still ultimately be discontinued, its interim extension will now apply during 2019. It will use the best of 2011 or 2016 SES scores.

PHASED IN PERSONAL INCOME TAX (PIT) SES SCORE METHODOLOGY

By 2022 all schools will be on PIT SES scores.

While the model recommended by the NSRB was based on the use of parental income, the PIT data set that was developed for NSRB deliberations measured median household income rather than median parental income. Many schools in the data set also had relatively low data matching rates when compared to the current SES methodology requirements.

To develop a robust data set measuring parent's income, schools will be required to conduct an annual address collection which will include parents' names and addresses from 2018. Whole-of-government data linkage processes will then link parents' names to personal income tax records.

Implementation of the new arrangements will be phased in over three years from 2020. Schools and systems will be able to choose whether individual schools commence in 2020, 2021 or 2022, depending on the impact of the PIT methodology and the most beneficial funding pathway for schools. Approved system authorities will continue to have the flexibility to redistribute funding between schools according to their own needs-based funding arrangements.

System weighted average SES Score will cease to be used for funding from the beginning of 2020.

The implementation of the new direct income measure will see the government provide an additional $3.2 billion in funding for the non-government sector during the transition to the new arrangements from 2020 to 2029.

AMENDED TRANSITION PATHWAYS

Schools transitioning up to 80 per cent Commonwealth share of SRS will complete their transition in 2023, while schools transitioning down to 80 per cent Commonwealth share of SRS will complete their transition in 2029, which is an additional two years from current arrangements.

The transition will be applied at the school level, including within systems.

THE CHOICE AND AFFORDABILITY FUND

The Government has announced a fund of $1.2 billion over 10 years, which will be split between the Catholic systemic and Independent sectors based on the sector share of schools, with $485 million for the Independent sector and $718 million for Catholic systems. This fund is an Australian Government initiative and was not a recommendation of the NSRB's review of the SES score methodology.

A key objective of the fund is to support schools and communities in drought affected areas, including regional and boarding schools.

The Choice and Affordability Fund will incorporate the $40 million National Adjustment Assistance Fund which was intended to provide adjustment assistance to individual negative growth schools during the previous transitional arrangements.

There will be agreed priorities and an agreement with government regarding how funds are to be used to support schools. Funds will be distributed through state and territory Associations of Independent Schools and state and territory Catholic education authorities.

ADDITIONAL WORK

The Department of Education and Training will establish a working group to progress on-going technical work across a wide range of data collection and matching issues. ISCA will be part of this ongoing work.

The Department of Education and Training will also establish a "robust and appropriately resourced" appeals process to be determined in consultation with the sector. This will allow schools and systems to request a review of their SES scores if they believe it does not accurately reflect their school community.

REVIEWS

The Government has also announced it would review the new funding arrangements in 2027 to ensure that they remain consistent with Government policy priorities, including targeting funding to need and support for parental choice, opportunity and diversity in the schooling system. The Government will also review the indexation arrangements of the SRS by 2023 to ensure that funding keeps up with costs.

ISCA's response to the announcement of the measures was to welcome the extension of 2018 funding arrangements to 2019 as it provides immediate certainty for schools planning for the new year.

ISCA also supported the announcement of transitional measures to support Independent schools that could, over the long term, face significant changes in government funding.

However, ISCA also notes that while the new measures for calculating government funding for nongovernment schools may create the foundation for a fair and reasonable resolution to past funding issues, there is still further work that needs to be undertaken on the complex technical issues involved in implementing the new methodology over the next ten years.

Going forward, ISCA will keep the sector up-to-date on developments and will continue to work with the Department on the progress and implementation of the new methodolog

INDEPENDENT SCHOOLS COUNCIL OF AUSTRALIA

News from the ***CEO***

ASBA STRATEGIC PLAN 2018~2021

One of the more important activities undertaken by the ASBA Board this year has been the development of the new Strategic Plan for 2018~2021. This was done over a period of some twelve months at various planning meetings and has created a plan from which many exciting Strategic Key Initiatives have been developed. I have included a graphic of the Strategic Plan on the following pages (22 & 23) for your information. Should you have any queries regarding the Plan, please feel free to contact me to discuss.

ASBA 2019 MENTORING PROGRAM

The Board of ASBA have been so pleased with the 2018 pilot Mentoring Program that it has put its full support behind a professionally-hosted program run on an online platform provided by *Art of Mentoring.* The online platform includes resources, webinars and tools that would not have been easily provided by ASBA. The 2019 Program will better facilitate mentoring relationships between our more experienced ASBA members and those newer to the industry to share advice, knowledge and experience resulting in a mutually beneficial professional development relationship.

This initiative is a step forward in the implementation of our new Strategic Plan 2018~2021 as it will serve to promote a dynamic, inclusive and collaborative Association with strong networking and collegial opportunities for members. The program opened on Monday, 5 November and there are maximum places available for 15 pairs, and these are already filling fast.

The ASBA 2019 Mentoring Program will begin at the end of January 2019 and end in December 2019. Mentees will enter the Program at no cost. The cost to a Mentee will be $500 (Inc. GST) which will need to be paid first through the ASBA gateway at http://asba.asn au/2019MentoringProgram.

Applications will close on 31 December 2018 with matches to be notified by 28 January 2019. To access the Online Platform and enter your application, please access asba-limitedmentoring-program-2019.aomapp.net.

ASBA2019 – HOBART 1~4 OCTOBER 2019

Registration for the ASBA National Conference in Hobart next year are now open and you can register at www.asba2019.ptly.com. The website has been loaded with information about the program, speakers, accommodation choices and the beautiful location. The Conference Committee and the local ASBA (Tas) members are very much looking forward to an amazing conference in a wonderful location. Great speakers, great events, fun activities and lots of learning!

The exhibition is already mostly sold out, so things are hotting up for the conference!

Keep your eye on your emails for the monthly registration prize draws of a delicious Tassie hamper.

REMINDER

ALLIANCE WITH AUSTRALIAN INSTITUTE OF COMPANY DIRECTORS

ASBA is a proud supporter of the Australian Institute of Company Directors' (AICD) excellent courses in governance, and many of the ASBA Board members as well as your School Council/ Board members have completed the Company Directors' Course ™, which the AICD refers to as 'the benchmark in director training.' This course is extensive and provides 'a thorough understanding of compliance, risk, strategy, finance and the role of the board." To help the newer Business Managers in the group, AICD also offers the Foundations of Directorship ™ Course, which is 'tailored to new and aspiring directors, senior executives and managers.'

For further information, go to www.aicd.companydirectors.com.au.professional-development-handbook.

To assist you to get started in your relationship with AICD, ASBA has negotiated to waive the AICD joining fee of $220 (inc.GST) for fully paid up ASBA members during 2018.

This is a great discount and also means that your fees for the Company Directors Course ™, the Foundations of Directorship ™ Course and any other courses or events you wish to attend will be reduced to a member-only fee - a significant saving.

Membership with the AICD will help you to understand your duties and responsibilities as a Company Secretary and to stay current with access to their up-to-date governance resources to assist your Board.

Please support this great new initiative by signing up as an AICD Member.

To access the joining fee waiver: email NewMemberApplications@aicd.com.au or phone Susan Hambleton on (03) 9245 4208.

If you have any questions, concerns or queries about anything ASBA, please don't hesitate to contact me at admin@asba.asn.au.

MERRY CHRISTMAS AND A HAPPY NEW YEAR

As this is the final edition for the year, I would like to wish you all a wonderful Christmas and New Year with your family and friends. It has been a fabulous year for ASBA with many exciting initiatives coming to fruition and I'm sure 2019 will continue along the same vein. I am privileged to be in this role and look forward to working with you all in 2019!

Pip Thomas | ASBA Chief Executive Officer

ASBA

Association of School Business Administrators

The Association of School Business Administrators Limited represents associations of business administrators who are employed in non-government schools throughout Australia and New Zealand.

It comprises eight Chapter associations in the Australian Capital Territory, New South Wales, New Zealand, Queensland, South Australia/Northern Territory, Tasmania, Victoria and Western Australia. Chapters collectively have more than 1,100 members.

OUR VISION

To be known as the leading professional organisation for school business administrators promoting and driving improvement and business excellence in Australasian Schools.

Mission

ASBA supports Chapters to promote business excellence by:

Offering and promoting high quality professional development opportunities.

Enabling collegiate networks locally, regionally, nationally and internationally by facilitating an interactive website for member engagement

Being the leader in governance championing integrity, accountability, diversity and innovation

Recognising and celebrating outstanding contributions of Chapters and their Members

Actively supporting other educational bodies with advocacy as required to support the education sector

STRATEGIC PLAN | 2018 - 2021

Strategic Pillars, Strategies and Goals

STRATEGIC PILLAR 1
Excellence in Leadership and Governance

Develop a governance model that supports excellence in corporation governance and association administration that strives to achieve innovation and continuous improvement.

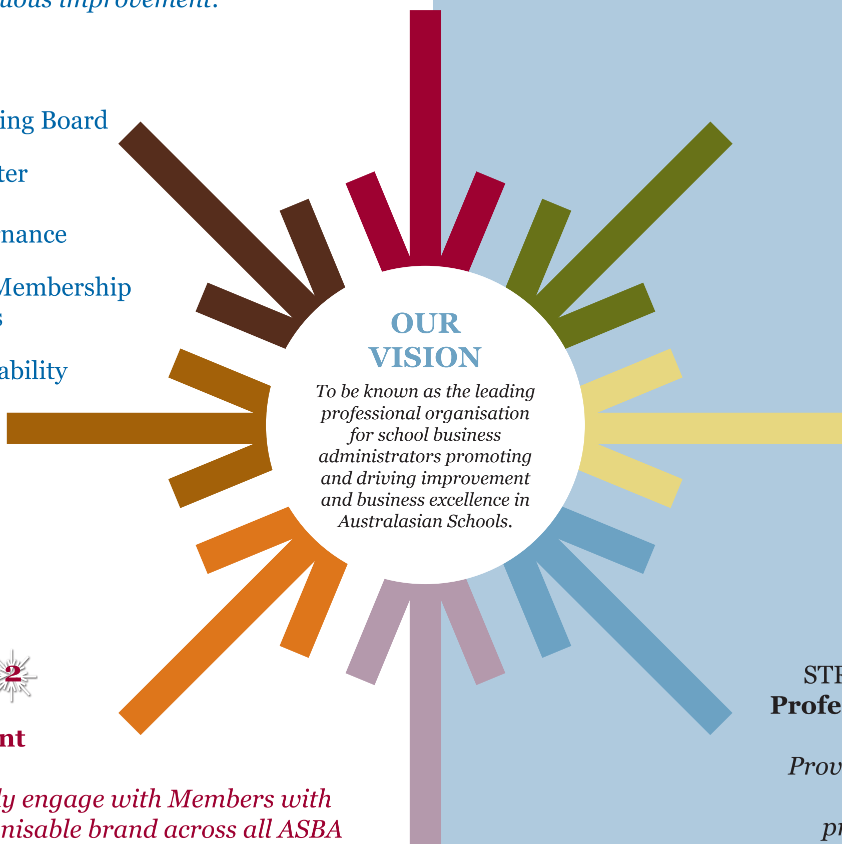
Strategies:

1.1. Effectively operating Board

1.2. Support for Chapter Management Committee Governance

1.3. Commonality of Membership between Chapters

1.4. Financial Sustainability



STRATEGIC PILLAR 2
Chapter and Member Engagement

Encourage and actively engage with Members with a consistent and recognisable brand across all ASBA Chapters.

Strategies:

2.1. Promote a dynamic, inclusive and collaborative association with strong networking and collegial opportunities for Members

2.2. Leverage off Strategic Partner relationships to support and promote Chapter & member engagement through enhanced PD offerings to members.

2.3. Active engagement with Chapters

STRATEGIC PILLAR 3
Professional Development

Provide dynamic, accessible, relevant and affordable professional development opportunities to enhance the skills of all Chapters and their Members.

Strategies:

3.1. Manage, promote and support the ASBA National Conference as the premier event and focus of the Association

3.2. Review ASBA PD Leadership structure & activity

3.3. Support Chapter conferences and events

3.4. Facilitate the provision of a broad range of professional development opportunities and resources with themes of learning

ASBA ISBA
Inaugural ***UK Study Tour***

The 12-day tour (including travel time) included attendance at ISBA's annual Bursar's conference held in Brighton as well as five pre-arranged school visits.

Key purposes of the study tour included:

Structured professional development from attendance at the ISBA conference;

Unstructured professional development from school visits; and

Networking with other school administrators (from Australia, the UK, and elsewhere) in both formal and informal settings.

As the tour incorporated some weekend periods, there was also some down time scheduled for sightseeing, art galleries, museums, West End performances – oh, and shopping!

ISBA ANNUAL CONFERENCE

The ISBA conference is held annually and so is shorter than the Australian conference, being over two full days. Unlike our conference, there is regularly a strong international contingent in attendance and this year was no exception. However, with a delegation of 21, Australia certainly had the second largest contingent at this particular conference after the "locals".

Our group enjoyed a tailored pre-conference briefing from the ISBA CEO, David Woodgate, which covered the issues and challenges facing independent schools in the UK and summarised the conference agenda. David's presentation provided some great insights into the key issues facing non-government schools in the UK, some key ones including:

Affordability of tuition fees; many years of tuition fee increases that have exceeded wages growth have made many non-government schools unaffordable for working professionals (a traditional key market for many of these schools).

Financial stressors facing the UK middle class arising from general economic conditions and the economic uncertainty surrounding Brexit.

Uncertainty surrounding the direct impact of economic and political pressures on non- government schools, including; Brexit, the potential for VAT on school fees, and the risk of a loss of charitable status for taxation purposes.

The conference sessions offered some great technical content, the majority of which was directly relevant to the Australian context, or could be easily adapted.

The conference dinner, including a Royal Toast, was a considerably more formal affair than the Australian equivalent. It was a black tie dinner and the only ones with their jackets off for the entire evening were the two Australian tables! There was no band or dancing to be seen, replaced by an after dinner speaker, who some seemed to enjoy! I did though appreciate the after dinner spirit selection – ordered early in the evening and served directly to your table.

IN MAY 2018 ASBA LIMITED HOSTED A STUDY TOUR OF ENGLAND FOR 21 ASBA MEMBERS FROM ACROSS AUSTRALIA. THE TOUR GROUP INCLUDED REPRESENTATIVES FROM EVERY CHAPTER EXCEPT FOR ACT, WESTERN AUSTRALIA, AND NEW ZEALAND.

THE TOUR WAS ORGANISED ON ASBA'S BEHALF BY TRAVELRITE INTERNATIONAL AND WAS COORDINATED IN CONJUNCTION WITH THE INDEPENDENT SCHOOLS' BURSARS ASSOCIATION (ISBA) – THE UK EQUIVALENT OF ASBA LIMITED. IT WAS UNFORTUNATE THAT OUR CEO, PIP THOMAS, WAS UNABLE TO ACCOMPANY THE TOUR DUE TO PERSONAL CIRCUMSTANCES AFTER THE CONSIDERABLE EFFORT THAT SHE HAD PUT INTO THE PLANNING PROCESS. THE GROUP WAS HOWEVER THANKFUL THAT FORMER ASBA LIMITED CHAIR, KATHY DICKSON, AGREED TO TAKE ON THE TOUR COORDINATION ROLE AT LATE NOTICE, AND SHE DID A MARVELLOUS JOB!

SCHOOL VISITS

Each of the schools visited offered something different to see, consider, and apply to an Australian context. The schools visited, ranging from the very, very old to the quite new, were –

Kings College (Canterbury) - (founded 1541) https://www.kings-school.co.uk/

Harrow School (London) - (founded 1572) https://www.harrowschool.org.uk/

Dulwich College (approximately 2 hours north of London) - (founded 1619) https://www.dulwich.org.uk/senior-school

Ardingly College (Sussex) - (founded 1858) http://www.ardingly.com/

Leicester Grammar School (Leicester) – (founded 1981) http://www.leicestergrammar.org.uk/

ASBA ISBA Inaugural ***UK Study Tour*** *(Continued)*

The five schools were all academically elite, four of the five had very long histories (over centuries), and all were high fee-paying schools.

Schools in England have 3 Terms per year, starting in September. There are 33 weeks of schooling per year, many less than is typical in Australia. However, students have longer school days and the senior day students generally seem to stay on campus until well into the evening.

More so than in Australia, the established schools clearly run as a business, leveraging their assets, both physical and intellectual. A very common catch cry was the need to "sweat the assets", as independent income streams were seen as a critical element to containing fees growth - and hence the escalating lack of fee affordability. To accommodate this approach, most of the schools had many more non-teaching than teaching staff. It is rare for schools in England to receive any form of government assistance and the schools that we visited had very high fees, typically annual fees per student of between £35,000 and £40,000.

Most of the Schools visited were extremely sought after, with high demand from within England, and increasingly from overseas as well. They are able to be highly selective schools as the number of applications generally far exceeds the available places.

As well as catering for international students on campus, the majority of the larger and older schools have established their own international schools / campuses – especially in Asia. They are aggressively tapping into overseas demand for a western style education, enabling a smooth transition for overseas students into the best international universities. A profit motive was the clear driver of this expansion and considerable financial returns were being achieved.

The schools that we visited, especially the very well-established ones, typically had massive land holdings (i.e. hundreds of acres), and some are like small villages. They have outstanding facilities and support services and sport is a significant physical presence, with top-notch grounds and facilities. Cricket and Rugby featured prominently but also tennis, hockey and other team sports.

The older schools, like Harrow and Kings College (which represents itself as being the oldest continuously operating school in the world) have a strong ethos underpinned by striving for excellence. They have a long history of attaining outstanding academic results and old scholars who achieve excellence in all endeavours. Harrow, for example, includes amongst its famous Old Harrovians, war time Prime Minister Sir Winston Churchill. Other distinguished Old Harrovians include eight former Prime Ministers, five kings and members of various royal families, three Nobel Prize winners, and twenty Victoria Cross recipients. It makes for an impressive honour board!

REFLECTIONS

It was a privilege to be a part of the inaugural ASBA Limited study tour to England. There is no doubt in my mind that the tour achieved all of the objectives that I outlined in the introduction to this report.

The ISBA representatives made us feel very welcome and they clearly appreciated the effort that we had made to be there. It was a great way for us to strengthen ties with the UK body, and there is considerable enthusiasm for them to reciprocate with a study tour to the 2019 ASBA conference in Tasmania.

I would estimate that 75% of the conference content could be directly applied, with minimal adaption for local conditions, in an Australian context. The remaining 25% was interesting to be exposed to but very much specific to a UK political and regulatory overlay.

Whilst some of the schools visited were fundamentally different in their structure, resourcing and outlook to an "average" Australian independent school, they still had much to offer in terms of thinking about our own schools and how we can look at them differently.

Overall, there can be no doubt that the study tour was a massive success and I am certain that it will be met with continued enthusiasm if the tour, and perhaps others to 'like- minded' jurisdictions such as Canada, is run as a regular event on the ASBA Limited calendar.

Shaun Sargent | The Friends' School, Hobart

Limited time offer

Meeting with Ricoh has its perks

Ricoh Australia, strategic ASBA partner and leading provider of school place technology, is excited to announce a **limited time offer** for ASBA members.

Until 30th November 2018, you can receive a FREE Nespresso coffee machine* for your school by becoming a Ricoh customer.

But what's a coffee machine without some of the good stuff? Lock in your education solutions and we'll throw in a 6-month supply of coffee.*

For more information, book an appointment with a Ricoh Education Expert at: bit.ly/ricohnespresso (and clear a space for your coffee machine).

Talk to the education experts

Ricoh understands the Business of Schools. From devices and connected classrooms, to interactive learning wherever teachers and students might be, Ricoh is focused on empowering Australian schools through digital transformation.

Buy some time

What if your admin team and teachers had a chance to connect with each other? To spend less time on compliance, processes and be inspired by a world of possibility and learning?

Give them time out (and a coffee) and watch them discover new ways to get more done with less and be part of the digital education revolution.

Business of Schools

13 RICOH

*Terms and conditions apply.

*Improving **Fee Collection***

A THREE PART PROCESS

IN THIS SERIES OF THREE ARTICLES, I HAVE BEEN CONSIDERING PRACTICAL WAYS OF ENSURING THAT PARENTS ACTUALLY PAY SCHOOL FEES. IN THE NOVEMBER 2017 ISSUE OF ASSOCIATE, I FLAGGED THE DANGERS OF ENGAGING IN MISLEADING CONDUCT BEFORE A CHILD WAS ACTUALLY ENROLLED. IN THE MAY 2018 ISSUE, I LOOKED AT THE ENROLMENT CONTRACT – A VITAL DOCUMENT WHEN SEEKING TO RECOVER FEES. IN THIS FINAL ARTICLE, I EXAMINE SOME PRACTICAL ISSUES IN THE ACTUAL FEE RECOVERY PROCESS.

PRACTICAL ISSUES FOR FEE RECOVERY

BY DAVID FORD | EMIL FORD

HAVE BOTH PARENTS SIGN!

It is very important that both parents sign the Application Form and the acceptance of the offer of a place for their child at the school. The school only has a contract with the people who accept the offer. Accordingly, the school can only seek to recover unpaid fees from the people who have accepted the offer. If only one parent has accepted the offer, the school can seek to recover fees from that parent alone.

BEWARE THE CONSUMER CREDIT CODE

Although most parents have good intentions when they enrol their children, occasionally they are unable to pay school fees on time. Schools are often put in the awkward position of deciding whether to end the child's enrolment or to try to come to some arrangement with the parents to pay the outstanding fees by instalments. If a school agrees to an instalment arrangement, the school ought to ensure that it enters into a new contract with the parents that complies with the Australian *Consumer Credit Code*. Failure to comply with the Code can lead to civil penalties up to $500,000 and criminal charges so it is important to understand the school's obligations under the Code.

Basically, if a school enters an instalment arrangement which defers the debt to a later time, it cannot charge interest or any other fee to the parents, assuming that the instalment arrangement will exceed 62 days. Therefore, entering instalment arrangements with parents is of little benefit to schools.

However, the school will only provide credit if the debt is deferred. If the enrolment contract provides for interest or some other charge on late payments, the school may charge the interest or fee without providing credit if it does not defer the debt. Therefore, schools are better off not entering instalment arrangements with parents.

LATE PAYMENT FEES

Schools commonly include provisions in their enrolment conditions giving them the right to charge late fees where parents do not pay school fees on time. The High Court has looked at this issue two years ago. In a case involving a bank, the Court asked:

(a) whether the fee was extravagant and unconscionable in amount compared to the greatest conceivable loss; and

(b) whether the late fee was a genuine pre-estimate of damage.

The significance of this case for schools is that it underlines the importance of ensuring that the any late fee provisions do not act as a penalty. Although the bank was successful, the judgment highlights that when a school imposes a late fee it is important that the fee reflects the estimated cost to the school of the school fees being paid late and is not an amount that could be considered extravagant or unconscionable. In the words of the Court, the late fee should operate as "compensation" to equalise the school's losses. It should not seek to penalise.

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Improving ***Fee Collection*** *(Continued)*

A TERM'S FEES IN LIEU OF NOTICE

Typically, enrolment terms require parents to give a term's notice that a student is to be withdrawn. This is followed by a statement that a term's fees will be charged where notice is not given. Is this enforceable? The law says "No" if it is a penalty but "Yes" if it is for "liquidated damages".

A penalty is a requirement to pay an amount of money to frighten the potential offending party into compliance; for example, saying to parents: "Give notice or pay up!". Liquidated damages, on the other hand, are a genuine pre-estimate of the damage to the school of the parents' failure to give notice. To determine whether the term in the enrolment contract is a penalty or liquidated damages, one must look at the circumstances when the contract is entered into, not when the parents' fail to give notice which may be years later. One must look at the contract to see whether it was the objective intention of the parties that the term was to be a penalty or that it be a genuine pre-estimate of the value of the damage. The parties' subjective intention is irrelevant. The name, if any, given to the payment in the enrolment contract is also irrelevant.

I suspect that very few schools have inserted this term in their enrolment contracts after giving careful consideration to the damage they will suffer if a student is withdrawn without a term's notice. Nevertheless, it is no obstacle to the amount stipulated being a genuine pre-estimate of damage that the consequences of the breach are such as to make precise pre-estimation almost an impossibility. Indeed, that is just the situation when one needs to estimate the amount of the future damage. Of some comfort is that the High Court has said that latitude must be given to genuine pre-estimates of damage, and that the sum must be "out of all proportion", or "extravagant, exorbitant or unconscionable" before being declared a penalty.

THE FAMILY COURT AND FEES

The Family Court makes orders directed to the parties before it, usually the parents. These orders cannot vary the terms of the enrolment contract. For example, if the Family Court has ordered the father to pay school fees in a situation where both parents have signed the enrolment contract, the school can, despite the court order, sue one or both for any unpaid fees. If, in this situation, the school recovers some or all the fees from the mother, she may be able to recover them from the father because of the court orders but this is not the school's concern.

EFFECTIVE FEE RECOVERY IS IN YOUR HANDS!

I don't need to tell you the importance of recovering fees promptly. While most parents pay their fees when due, the handful of those who don't need to be dealt with fairly, firmly and quickly. This is all quite possible if the school has a good enrolment contract and an effective enrolment process. These should make suing for your unpaid fees a thing of the past.

However, if you have to litigate, be encouraged by the comments of one Australian judge:

> *"The School operates a business. It enters into contracts with parents to provide a service and parents agree to pay fees for that service. It is an express term of the contract entered into that such fees are payable as and when they fall due"*

12 KEY QUESTIONS

YOUR GUIDE TO *More Effective Board Meetings*

MOST PEOPLE KNOW THAT MEETINGS OF ANY KIND CAN BE UNPRODUCTIVE, AND UNFORTUNATELY BOARD MEETINGS ARE NO EXCEPTION. IN MANY CASES, BOARD MEETINGS ARE EVEN MORE UNPRODUCTIVE THAN EVERYDAY OFFICE MEETINGS. WHY? WE CAN POINT TO ANY NUMBER OF REASONS: PERSONALITY CLASHES BETWEEN BOARD MEMBERS, HIGH-STRESS TOPICS, AND ORGANISATIONAL OR COMMUNITY POLITICS CAN CAUSE NO END OF PROBLEMS. BUT MOST UNPRODUCTIVE BOARD MEETINGS (AND BOARD PROBLEMS IN GENERAL) ARE ACTUALLY CAUSED BY STRUCTURAL CHOICES OR ASSUMPTIONS. THIS MEANS THAT SIMPLE CHANGES TO BASIC ASPECTS OF YOUR MEETINGS — LIKE TIMING AND AGENDA STRUCTURE — CAN SHIFT A BOARD MEETING FROM UNPRODUCTIVE TO HIGHLY EFFECTIVE.

AFTER ALL, THE ENTIRE REASON A BOARD EXISTS IS TO UNDERTAKE STRATEGIC DISCUSSION AND DECISION MAKING. IF YOU'RE NOT SETTING THE BOARD UP FOR SUCCESS AT THE MOST FUNDAMENTAL LEVEL BY HAVING THE BASICS RIGHT, THEN YOU CAN'T EXPECT QUALITY OUTCOMES THAT WILL CONTRIBUTE TO A POSITIVE FUTURE FOR YOUR ORGANISATION.

BELOW ARE 12 QUESTIONS TO ASK THAT WILL HELP ENSURE YOUR BOARD MEETINGS ARE RUN IN A WAY THAT CONTRIBUTES TO QUALITY STRATEGIC DISCUSSION AND DECISION-MAKING.

1 DOES YOUR MEETING TIME MATCH YOUR BOARD MEMBERS' CHRONOTYPE?

In his book When: The Scientific Secrets of Perfect Timing, author Daniel Pink discusses how an individual's chronotype (or propensity to sleep at a certain time during a 24-hour period) heavily influences the quality of their thinking and decision-making throughout the day. Pink identifies three basic categories of chronotype: early-rising "larks", night-dwelling "owls", or somewhere in between "third birds".

Based on evidence from a variety of disciplines and cognitive studies, Pink demonstrates how third birds and larks make their best-quality decisions in the mid- to late-morning. But for owls, this generally happens in reverse. Pink's book suggests that most of us can focus and analyze best in the morning while being more creative with less structure in the late afternoon.

Is there a pattern amongst the chronotypes of your board members? If so, there could be an optimal time to hold your board meetings: one when your members are more cognitively alert and can engage in high-quality strategic decision-making.

2 ARE YOUR BOARD MEMBERS WELL FED?

If you've ever been to the supermarket while hungry, you already know that making decisions on an empty stomach can lead to poor outcomes. The feeling of hunger can make us increasingly upset and irritable — also known as "hangry". If your members are hangry at board meetings, they're likely making worse decisions, becoming argumentative, or being combative in their discussions with other board members.

Need proof in order to secure a lunch budget for your meetings? A study by Karolina Skibicka of the University of Gothenburg showed that the hormone ghrelin (produced in our stomachs before eating) has a negative effect on both decision-making and impulse control. Another study from the University of South Dakota showed that low glucose levels in the blood cause people to significantly discount the value of future rewards. This can be a major issue if a hangry board is making strategic decisions that affect the organisation long-term!

In fact, there's no shortage of studies demonstrating the negative impact of being hungry on decision quality. The simple fix? Ensure your board members are well fed before meetings so they're more likely to make better decisions.

3 IS THE AGENDA CONCISE AND CLEAR?

Have you been in a meeting with a long-winded agenda that wasn't clear? Meandering board meetings like this can be painful, ultimately causing board members to mentally check out. Once someone has lost focus on your key topics, their contributions to the discussion and decision-making will be lacking. Instead, look for ways to make your agenda more concise to keep members involved and focused on the right points.

One sure sign that your agenda isn't concise enough? Check whether your dot points are nested more than two levels deep. E.g.:

• Agenda Item 1 • Agenda Sub Item 1 • Sub Agenda Sub item • Sub sub agenda sub item 1 • Sub sub agenda sub item 2

If an item requires more than two sub-levels, this is a bigger topic that may require its own separate discussion point — or maybe even its own board meeting.

4 DO YOUR BOARD MEETINGS FOLLOW AN AGENDA TEMPLATE?

Having a consistent agenda at each meeting with a similar structure can help improve the flow and cadence of your board meetings. If the agenda for every meeting is structured completely differently, then board members must waste valuable time and mental energy trying to decode it.

Using a consistent template means they can focus more on the topic at hand than when to discuss it. Following a template doesn't mean things can't be adjusted on a case by case basis, but a well-thought-through agenda template should meet nearly all of your needs at every meeting.

5 ARE BACKGROUND ITEMS FROM MANAGEMENT CLEAR, CONCISE AND FOLLOWING A TEMPLATED PATTERN?

Just as the agenda itself should be concise and follow a consistent structure, all materials submitted for the board's consideration should be equally clear. If a particular report or update is regularly provided to the board, then it should be consistently structured each time.

Consistency in these papers and presentations helps board members process the information more effectively and see trends over time. If there's a special case requiring attention, the difference will stand out more and your board can address it effectively.

6 DO YOU ALLOCATE A SPECIFIC AMOUNT OF TIME FOR EACH AGENDA ITEM?

If the agenda is too long for the allotted meeting time, you won't make it through all items — or you'll rush to fit everything in. Neither situation is ideal. Pre-allocating an estimated time for each agenda item can help keep the meeting to your set time and keep discussion on-track. It also forces you to think in advance about whether the allocated meeting time and the time needed for agenda items match.

If you've never done this before, try a simple system first that weights each agenda item against the others. Then decide how much time to allocate to each item based on strategic importance. More heavily weighted items should be pushed to the front of the agenda where possible.

7 ARE YOU HOLDING TOO MANY (OR TOO FEW) BOARD MEETINGS EACH YEAR?

Getting the number of meetings per year right is critical. Too many meetings, and you're wasting your board members' time; too few, and you'll constantly have agendas that are overloaded, meetings that run over, or agenda items that are always pushed to the next meeting.

Look for the sweet spot that meets all your needs. Getting it right may take some experimentation; try quarterly or bi-monthly with supplemental committee meetings to fill any gaps or plan for special events.

8 ARE MATERIALS AVAILABLE TO BOARD MEMBERS BEFORE MEETINGS?

Are Materials Available to Board Members Before Meetings? Board members need to get their meeting packs with enough time to extensively review all materials prior to the meeting. This means they'll be well prepared to engage in productive discussion. The last thing you want is a board member seeing a document for the first time at the meeting! Board portal systems such as Our Cat Herder can help alleviate this issue.

9 DOES YOUR BOARD HAVE TOO MANY MEMBERS?

If you feel your board meetings are ineffective, consider whether each member is carrying their weight...or even if each member is fully necessary. In Decide & Deliver: 5 Steps to Breakthrough Performance in Your Organization, Blenko et al. argue that once you have more than seven people in a decision-making group, each additional member reduces decision effectiveness by 10%. Wharton management professor Katherine J. Klein says that "As a team gets larger, there is a tendency for social loafing, where someone gets to slide, to hide."

In meetings, each additional person in a group also contributes to communication overhead, or the amount of time you spend communicating with people instead of making decisions. This is inefficient and ineffective for your board meeting's ultimate goal.

10 ARE YOUR BOARD MEETINGS STARTING ON TIME?

Starting the meeting when you say you'll start the meeting is simply good board meeting hygiene. Waiting for members who are running late signals to the board that it's acceptable to be late — or not show up at all.

While there must be some leniency for extreme situations, you should have a clear three-strikes policy on missing meetings, and a similar guideline for being late. Consider implementing a written code of conduct that each member signs when joining the board.

11 ARE YOU RECORDING, ASSIGNING AND FOLLOWING UP ON ACTIONS?

An example action might be: "Board Member A to check in with Board Member B regarding Finance Committee reports". Ensuring that action items are properly captured and assigned to the person responsible during the meeting ensures anything that needs to be actioned on isn't missed. It also gives you a chance to follow up with members and judge their performance to evaluate whether you have any "dead weight" on your board of directors (see Number 9 above).

12 HAVE ALL BOARD MEMBERS UNDERTAKEN GOVERNANCE TRAINING?

While not quite in the same vein as many of suggestions above, ensuring that your board members have engaged in some sort of training or professional development in the past 12 months helps ensure they are current on governance practice. They might also bring back other ideas for further improvements to the board that aren't listed here. See if there's an annual conference or other board learning event you can send your members to so they're up-to-date on best practices..

BOTTOM LINE:

IN BOARD MEETINGS, THERE'S ALWAYS SOMETHING TO IMPROVE

Even on boards that are functioning well, there are many aspects of your board meetings to potentially improve. However, one last word to the wise: don't attempt to make these changes all at once. Instead, introduce and implement one change at a time. Ensure you're getting the outcome you want; if not, then dig deeper into the issue and adjust before moving on to making the next change.

Making any changes to a board should be an iterative process. Many people focus on the most obvious issues (e.g., difficult board members) and not on nitty-gritty structural changes. But it's often the smaller changes — like improved agendas or a policy on missing meetings — that can have an outsized positive effect on better meetings, and ultimately create a better board for your organisation.

*Is the **Grass Greener** in the United Kingdom?*

Under the guidance of ASBA, 21 Australian Business Managers ventured to England to partake in the Independent Schools Bursars Association conference in Brighton, Sussex. How did the British fare in the complex theatre of operating a school? What challenges did their political and social landscape present, and what strategies did they engage in to maintain their efficiency? Is the British grass greener?

From the outset at the ice breaker drinks, the standard questions about student and staff numbers, fee charges and campus size generated a healthy exchange of information. The query on

Government support created the look of intrigue. Does the Australian Government provide funding to independent schools? ……what's the catch? …...how did this come about? Our hosts were now easily more interested in our landscape, than responding to queries about their own.

The Colonials related the 1960's anecdote of a Catholic school requesting Government assistance to operate, only to be denied. The subsequent school closure placed undue pressure on the local State schools. A Government rethink saw funding provided to the non-government school, this being the impetus of the Australian Government non-government school funding scheme.

What a sterling idea, quipped our British cousins. A similar scheme would sure ease pressure on our budgets. Collectively the Australians explained that the student engagement of non-government schools was beyond critical mass (greater than 30%). If non-government schools were to close, immense pressure would be applied to the government schools.

No reasonable Australian Government would contemplate the option. The corresponding British ratio sits at 7%. Our British colleagues lamented that their Government provided no funding directly to independent schools. A white lie to a degree, as they expanded on the benefits that their charitable status provides. Without charitable status they would be obliged to add a 20% VAT to their already high fees. Plus, the charitable status afforded them an 80% discount on their council rates. An 80% discount on Australian rates would provide a minor saving. Further probing revealed the 80% discount on their rates, translated into savings for British schools of between £150K up to £500K for the more elite large campus independent schools: significant.

The moot point for our British counterparts was whether they will be able to maintain their charitable status. The pending conference potentially could clarify the issue. Day One scheduled the keynote address: Brexit – where are the goal posts today? Delivered by Jonathan Hill, the former Commissioner for Financial Stability, Financial Services and Capital Markets Union, in the Prime Minister David Cameron's administration.

Channelling the song "Killing me Softly", Lord Hill, a most persuasive public speaker, highlighted that the legislative definition of charitable status requires the organisation to provide a tangible benefit to the public. He then mused that demanding a membership fee in excess of £30,000 appeared to be non-sequitur with the intent of the definition. Ever so eloquently he announced the removal of charitable status for British independent schools was merely a matter of time. The audience responded with a sigh of resignation.

As the Qantas flight lined up the runway back in Australia, with the onset of winter, the elevated view reflected a relatively green landscape.

ASBA/NAB Social Leadership Program
Scholarship Winner
William Neil, writes about his experience

SCALING FOR TRANSFORMATIVE IMPACT

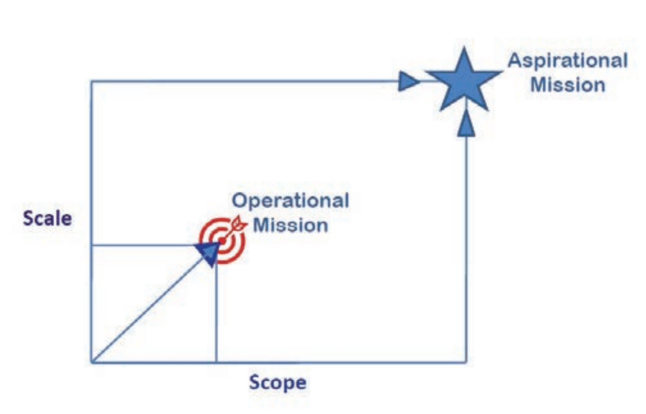
As ASBA members we have come to expect a very high standard of the professional development opportunities provided by our association. It is therefore not surprising that, in conjunction with the NAB, they have this year again sought to afford some members the opportunity to participate in a NFP leadership course facilitated by faculty from the illustrious Harvard Business School.

The program was entitled: ***NAB Social Leadership Program – Scaling for Transformative Impact.***

1. DERIVE A MEANINGFUL "OPERATIONAL MISSION"
2. BUILD A ROBUST 'THEORY OF CHANGE"
3. TEST THE ALIGNMENT OF STRATEGY WITH "MISSION" AND OPERATIONAL MISSION"
4. BUILD AN APPROPRIATE MEASUREMENT MODEL

DERIVE A MEANINGFUL "OPERATIONAL MISSION"

Professor Rangan took it for granted that all organisations would have an Aspirational Mission. He described it as the 'the guiding star that motivates it' and is what we might witness documented in the purpose or vision statements in our schools. He has observed, as we might have, that these aspirations are often of a scale and scope that however virtuous might never hope to be achieved. He believes this therefore leads to a lack of focus inefficiency and ineffectiveness. Rangan instead proposes that organisations need to derive a meaningful 'operational mission' that seek to bite off a part of their Aspirational Mission at a scale and scope that they can realistically chew. Only then will the organisation have a suitable platform to build their strategy.



"SOME THINGS MAY FALL WITHIN THE ASPIRATIONAL MISSION BUT SHOULD STILL NOT BE EMBRACED UNLESS THEY ARE FUNDAMENTAL TO THE OPERATIONAL MISSION. THIS IS THE KEY TO EFFECTIVENESS AND EFFICIENCY"

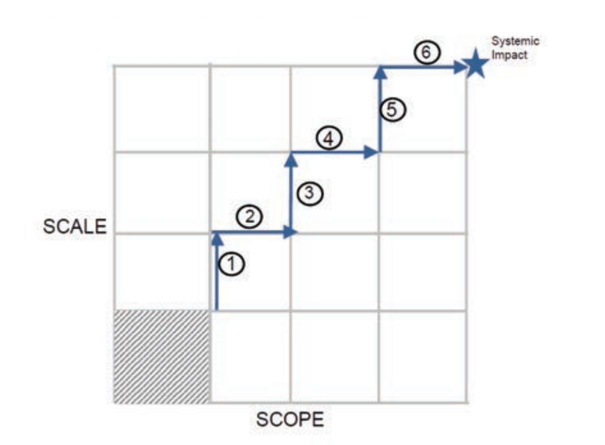
BUILD A ROBUST "THEORY OF CHANGE"

The next principle is building a 'theory of change'. In order to exert an influence the organisation must first develop an understanding of what factors underpin the status quo and then develop a robust theory of how its proposed interventions will achieve the Operational and ultimately Aspirational Mission being pursued. Once this has been confidently determined the organisation needs to put in place the structures (personnel, systems, products, tools and culture) needed to deliver them.

TEST THE ALIGNMENT OF STRATEGY WITH "MISSION" AND OPERATIONAL MISSION"

Once the theory of change has been developed a strategy needs to be implemented that delivers the desired interventions. Effectively at this stage the leader is converting the mission goals into effective, efficient and sustainable activities. It is however imperative that the strategy be carefully aligned with the Operational Mission and, ultimately, the Aspirational Mission.

ZIG-ZAGGING YOUR WAY TO SYSTEMIC IMPACT



For many organisations though their pursuit of their Aspirational Mission will not be linear. Professor Rangan used the example of expanding the SCALE of an organisation by adding locations – Zigging – and contrasted it with the decision to try and accelerate their impact by increasing their SCOPE by moving, for example, into Advocacy - Zagging. While potentially complementary, zigging and zagging are not necessarily the same business. The shift from a linear to multidimensional scaling strategy raises many philosophical, strategic and tactical questions for leaders as they seek to embrace 'Mission Stretch' and yet avoid 'Mission Creep'. The ability to evaluate strategy to ensure it maintains Operational and Aspirational Mission alignment is therefore critical but challenging..

ASBA
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BUILD AN APPROPRIATE MEASUREMENT MODEL

It is often quoted that "if you can't measure it, you can't improve it." Leaders must carefully decide on how they are going to 'keep score' in order to ensure that the various organisational participants are acting in accordance with the theory of change and remain aligned to the Operational Mission.

Measurement enables iteration and refinement and ultimately should lead to greater effectiveness and efficiency. Also, nothing motivates a team more effectively than seeing their efforts resulting in progress. Organisations must therefore not just measure, but choose carefully what they measure to ensure that they are incentivising the right directions and behaviours.

GOVERNANCE

The capstone for these four principles is Governance. Good governance is essential for setting the Aspirational Mission, ringfencing the Aspirational Mission, being convinced by the Theory of Change, ensuring the Strategy remains missionally-aligned (especially when zigging and zagging) and that the organisation remains disciplined in measuring their progress. If the leaders of your organisation can successfully implement those steps then, according to Harvard Business School, they should be well on the way to achieving real transformative impact.

William Neil | Business Manager

Advertorial

Lauriston Music Towers

IN HER ROLE AS BUSINESS MANAGER AT LAURISTON GIRLS' SCHOOL, CATHERINE TAN WAS LOOKING FOR A WAY TO FAST TRACK THE ADDITION OF MUSIC PRACTICE ROOMS AT THE SCHOOL. THE ROOMS NEEDED TO FIT IN A TIGHT FOOTPRINT WITH MAXIMUM FLOOR SPACE AND BLEND SEAMLESSLY INTO THE EXISTING ARCHITECTURE OF THE SCHOOL.

CONCEIVED BY ARCHITECTS AND MANUFACTURED IN AUSTRALIA, THE MULTI AWARD-WINNING HARWYN PODS HAVE BEEN AT HOME IN BOTH RESIDENTIAL AND COMMERCIAL FIELDS SINCE 2014. AND IN RECENT YEARS THEY'VE ALSO BECOME A POPULAR CHOICE FOR SCHOOLS, WITH THEIR ABILITY TO BE CUSTOMISED, OFTEN WITH MINIMUM PLANNING REQUIREMENTS AND NO-FUSS INSTALLATION. AS LAURISTON GIRLS' SCHOOL DISCOVERED, HARWYN PODS ARE FAST BECOMING THE SPECIALPURPOSE TEACHING SPACE OF CHOICE FOR MODERN SCHOOLS.

Q What were you looking for? Why was there a need for Harywn Pods?

A Lauriston had recently completed a masterplan with a number of staged works to occur over a 4 year timeframe.

As part of the masterplan process we identified that we had a lack of music practice rooms especially for our Junior students. Together with our architects we identified a suitable location for four music practice rooms abutting a two story building used for junior classrooms. Given the design of the existing building we were looking at two groups of double story music practice rooms to align with the existing ground and first floor levels.

The site identified was in a garden space in the centre of our campus surrounded by a number of other buildings. Traditional construction methods in this area would be quite disruptive and time consuming.

Q How did the search unfold? There are plenty of pre-fab options around as well as traditional building methods?

A We had originally planned to build these practice rooms towards the end of the masterplan project. We had started thinking about prefab options as the site was particularly difficult for an in-situ build. The music rooms would abut an existing building and it wasn't possible to complete traditional construction within a school holiday break.

I had been researching prefabricated building options and discovered Harwyn's website as part of my online research. I was interested in the pods' construction, how they were used by schools and the timeframe for delivery and installation of the pods. I attended a Business Managers' seminar and Jason was there with information about Harwyn.

From that initial discussion with Jason we went to look at another School and talked with their staff regarding the use of their pods and the installation process.

Q Was time a factor in choosing Harwyn over traditional building methods?

A We had originally planned to have the music rooms constructed towards the end of the masterplan project. The location of the music practice rooms was also an issue given they would be located very close to existing buildings and it would be difficult to build in the centre of the campus. Ideally we wanted a solution that allowed us to have four new practice rooms with minimal disruption to students' learning.

The pod solution allowed us to fast track the project and have the pods installed prior to our major works' program commencing. The added bonus was being able to have them installed during a school holiday break and to have students and teachers using them shortly after term commenced.

Q What were the design features that appealed to you?

A The modern exterior and clean design was appealing. We also liked that we could select an appropriate colour scheme to match the Lauriston branding and colours. There was also some flexibility with the interior fitout.

Q How do the pods compare to your existing classrooms?

A The pods are ideal for music practice rooms. The instrumental music teachers really enjoy using them. The pods are airconditioned and have been well utilised since they were installed.

Q Do they appear as a temporary fix?

A The pods are used as a more permanent solution to our shortage of music practice spaces. Given the music rooms were planned as part of an overall masterplan we expect they will be in this location for quite some time.

Q Is it appealing that the pods can be easily relocated if need be?

A Schools continually change and grow requiring for facilities to be upgraded and renewed.

The pods are relocatable which is ideal as we can move the pods to another location and continue to use these for our music program or put to an alternate use without major disruption to students' learning

.

Q Are the pods used regularly?

A The pods are used regularly by our music staff and our learning support staff. The space is ideal for a teacher and individual or small groups of students.

Q Is it possible that the pods would still be in the same location 15 years from now?

A They have been designed to complement existing buildings. It is very possible they will be in the same location 15 years from now. The use may change but we have the flexibility of changing the use or location if needed.

Q How did you find the process of dealing with Harwyn?

A The Harwyn staff were very helpful in assisting us to design a solution to meet our requirements for a two story pod. Hawrwyn had not designed and contracted a two story solution so we worked together to identify what was required.

The colours we initially chose were not available but we were able to work with Jason to find an alternate solution that gave us a great outcome as the new colour scheme better suited the environment

.

Q How have the staff, students and parents reacted?

A The staff and students were quite surprised when they returned from their school holiday break and the pods had arrived. They were keen to start using the pods. Naturally, when first installed, the community were curious about the new spaces but now they have blended in with the rest of the school.

The staff and students love using the pods and the music department are always booking these spaces. The location is ideal as it allows the rest of the school to see the musicians at work and it brings music to the forefront of the students' minds. It is lovely that music is not tucked away