

Data Navigator for Schools, 2025 Edition

NOTE THAT THIS IS A STATIC VERSION OF THE ONLINE SURVEY. IT CAN NOT SHOW THE ONLINE HINTS AND THE TOOLS TO VALIDATE TOTALS. THE ONLINE VERSION WILL TYPICALLY NOT SHOW ALL QUESTIONS BECAUSE OF EMBEDDED LOGIC BUT, AGAIN, THIS STATIC VERSION CAN NOT CAPTURE THIS.

For help, please visit <https://datanavigator.barnett-waddingham.co.uk/> or contact us using the information on that site.

The full survey guides are at <https://datanavigator.barnett-waddingham.co.uk/Guides.html> and please note that the survey has not changed since 2024 so that guide is still valid.

ISBA & Barnett Waddingham Data Navigator Survey 2025

You have been invited to complete the following survey for **YOUR SCHOOL** (the School) that will provide information securely for use in the Data Navigator. The Data Navigator will enable you to visualise your school's data in an intuitive, modern way to aid your business decisions.

You can submit partial completions if you do not have access to all the data. After you submit just contact us and we will send you a link to edit your submissions.

Structure of survey

There are eight sections relating to:

Section A: School

Section B: Pupils

Section C: Marketing

Section D: Surplus

Section E: Income

Section F: Expenditure

Section G: Other Financial Information

Section H: Pensions and benefits

Terms and conditions

The survey terms and conditions (Survey Terms) available at <https://datanavigator.barnett-waddingham.co.uk/contract/2025-Survey-Terms.html> are a legally binding agreement between the school on whose behalf you are completing this survey (the School) and Barnett Waddingham LLP (BW). The Survey Terms govern the School's use of, access to and participation in the Survey and what BW (and its Affiliates) may do with the responses and data provided to BW. By clicking 'accept' you warrant that you have the legal power to enter into the Survey Terms, on behalf of the School, and that the School agrees and accepts the Survey Terms. Please note in particular the limitations on liability contained in clause 7 of the Survey Terms. The Survey Terms are a business to business agreement and should not be entered into by consumers. If you have any questions please contact DataNavigator@Barnett-Waddingham.co.uk.

Are you happy to participate in this survey?

Please confirm that you are accepting the Survey Terms on behalf of the School.

If you are, please select yes below. If you are not, please select no, the survey will then immediately conclude when you go to the next page.

- ☐ Yes - I wish to participate.
- ☐ No - I do NOT wish to participate.

End of Block: Introduction

Start of Block: School

Section A: General School Information

This section contains general questions regarding your school such as location, facilities, property and how the school is registered to conduct business.

Source(s) of information we expect to be useful in completing this section

- Leasehold information found in management accounts.
-

A-01. How would you like your school to be referred to in the Data Navigator? ⓘ This is the name that will be shown on the legend of every comparative plot in the Data Navigator tool so we suggest to keep it short (but meaningful) in order not to clutter the graphics. If you can keep it to less than about 12 characters, that would be ideal. It can be a short name or even something like 'Our school'.

A-02. What is your school's URN, DE or SEED? ⓘ England, Wales, Channel Islands URN lookup here. Scotland SEED lookup here. Northern Ireland DE lookup here. Please email support if you genuinely do not have a government unique identifier.

A-03. Where is your school located? ⓘ

- ☐ England
 - ☐ Wales
 - ☐ Northern Ireland
 - ☐ Scotland
 - ☐ Jersey
 - ☐ Guernsey
 - ☐ Isle of Man
 - ☐ Other
-

If Other, where?

A-04. Is your school part of a group? ⓘ

☐ Yes

☐ No

What is your group? ⓘ For England and Wales, Group UID and Group ID can be looked up here.

	Value
Name of group	
Group UID (if known)	
Group ID (if known)	



A-05. What is the postcode of the main school premises? ⓘ

A-06. Is the main school premises Freehold or Leasehold? ⓘ

We would expect you to find this information in your account managements.

☐ Freehold

☐ Leasehold



What are the annual charges for the leasehold? ⓘ



A-07. How many further premises do you use for educational purposes that are at different locations? (up to a maximum of 10) [i](#)

Please provide data for all of these further premises. If any further premises are freehold please leave blank

Freehold or Leasehold?		Premises	Leasehold Charges	Postcode
Freehold	Leasehold	Name of premise	Total per annum	Postcode

Premises 1	<input type="radio"/>	<input type="radio"/>			
Premises 2	<input type="radio"/>	<input type="radio"/>			
Premises 3	<input type="radio"/>	<input type="radio"/>			
Premises 4	<input type="radio"/>	<input type="radio"/>			
Premises 5	<input type="radio"/>	<input type="radio"/>			

Premises 6	<input type="radio"/>	<input type="radio"/>			
Premises 7	<input type="radio"/>	<input type="radio"/>			
Premises 8	<input type="radio"/>	<input type="radio"/>			
Premises 9	<input type="radio"/>	<input type="radio"/>			
Premises 10	<input type="radio"/>	<input type="radio"/>			

A-08. What facilities does the school have? (Select all that apply) ⓘ

- ☐ All-weather athletics track
- ☐ Astroturf
- ☐ Concert hall/theatre
- ☐ Dance studio
- ☐ Fitness centre
- ☐ Rowing facilities
- ☐ Sports centre (Indoor facilities)
- ☐ Sports fields
- ☐ Squash courts
- ☐ Swimming pool
- ☐ Tennis courts

A-09. If applicable, please provide facilities that you wish to be included in the next release of the Data Navigator Survey ⓘ We will continue to enhance the survey and the Data Navigator every year, so if there are facilities that are important for you for benchmarking purposes then please suggest them here.

The below questions have been included in the survey due to the changes to VAT and (for England and Wales) Business Rate Relief. We have split the questions for registered charity status and Not-For-Profit Organisations to enable a more granular level of detail and to commence discussion if a School is run as a Not-for-Profit (NPO) but not as a Charity and thus in receipt of the benefits that this can bring. If you do not have this information, please leave blank.

A-10. Is the school a registered company? ⓘ

☐ Yes

☐ No

A-11. Is the school a registered charity? ⓘ

☐ Yes

☐ No

A-12. Is the school a Not-For-Profit Organisation (NPO)? ⓘ

☐ Yes

☐ No

You have reached the end of section A

Please click on the "Next" button in the bottom right hand corner of the page to complete section A and store your answers

A tick will appear next to the section name in the floating navigator on the left of the page

Alternatively, select "return to contents page". This will also save your inputs but not mark the section as complete

You are able to amend your answers at any point until the survey is finally submitted

End of Block: School

Start of Block: Pupils

Section B: General Pupil Information This page contains general questions regarding your pupils.

This section relates to information based around the pupils of the School including the numbers in the previous and current academic year, gender splits, capacity and destination of leavers.

We note that pupil numbers, especially those in the early years and nursery may fluctuate to a higher degree than other year groups throughout the year. Please note that if this is your School's first year of using Data Navigator, the number of pupils may appear to decrease dramatically from the two fixed points of August 2025 to September 2025 (31 July 2025 to 1 August 2025 for Scotland)

where, in reality, this is part of the regular cycle that will become apparent through future years comparisons to create an additional resource for your use.

Source (s) of information we expect to be useful in completing this section

- Admission department
 - Admission Information from the person(s) in charge of Sixth Form and senior School (if offered at your school)
-

You are asked for details of the previous academic year as questions marked “as at 31 August 2025” and for the current academic year marked, “as at 1 September 2025”

For schools in Scotland, please take these dates to mean the end and beginning of your school year, which will normally change around mid-August.

For detailed information on the splits of boarding type, please refer to the Data Navigator Guide, for quick reference, these are stated below;

Day Pupils - Do not stay on the premises overnight

Flexible - Up to and including 3 days boarding

Full / Weekly - Over 3 days boarding

For detailed information on the splits of pupil type, please refer to the Data Navigator Guide, for quick reference, these are stated below;

Nursery - Pre-School

Junior - Reception to Year 6 (P1 to P7 in Scotland and Northern Ireland)

Senior - Year 7 to Year 11 (S1 to S4 in Scotland; Year 8 to 14 in Northern Ireland) (Note that we apply the convention that there is no Year 7 equivalent in Scotland to keep S5 of S6 aligned with English sixth form and with Northern Ireland Year 13 to 14.)

Sixth Form - Year 12 to 13 in England (S5 to S6 in Scotland; Year 13 to 14 in Northern Ireland)

B-01. Number of pupils by boarding type as at 31 August 2025 ⓘ (Labels in brackets are for Scotland / Northern Ireland) Information on the following questions about the pupils may be gathered from your administration team.

	Nursery	Reception (P1)	Year 1 (P2)	Year 2 (P3)	Year 3 (P4)	Year 4 (P5)	Year 5 (P6)	Year 6 (P7)	Year 7 (NA / Y8)	Year 8 (S1 / Y9)	Year 9 (S2 / Y10)	Year 10 (S3 / Y11)	Year 11 (S4 / Y12)	Year 12 (S5 / Y13)	Year 13 (S6 / Y14)
Day pupils															
Up to and including 3 days boarding (Flexi)															

Over 3 days boarding (Full / Weekly)															
Total															

B-02. Number of pupils by gender as at 31 August 2025 ⓘ

(Labels in brackets are for Scotland / Northern Ireland)

Information on the following questions about the pupils may be gathered from your administration team.

	Nursery	Reception (P1)	Year 1 (P2)	Year 2 (P3)	Year 3 (P4)	Year 4 (P5)	Year 5 (P6)	Year 6 (P7)	Year 7 (NA / Y8)	Year 8 (S1 / Y9)	Year 9 (S2 / Y10)	Year 10 (S3 / Y11)	Year 11 (S4 / Y12)	Year 12 (S5 / Y13)	Year 13 (S6 / Y14)
Girls															
Boys															

B-03. Number of pupils by boarding type as at 1 September 2025 ⓘ

	Nursery	Reception (P1)	Year 1 (P2)	Year 2 (P3)	Year 3 (P4)	Year 4 (P5)	Year 5 (P6)	Year 6 (P7)	Year 7 (NA / Y8)	Year 8 (S1 / Y9)	Year 9 (S2 / Y10)	Year 10 (S3 / Y11)	Year 11 (S4 / Y12)	Year 12 (S5 / Y13)	Year 13 (S6 / Y14)
Day pupils															
Up to and including 3 days boarding (Flexi)															
Over 3															

days
boarding
(Full /
Weekly)

JS

B-04. Number of pupils by gender as at 1 September 2025 ⓘ

	Nursery	Reception (P1)	Year 1 (P2)	Year 2 (P3)	Year 3 (P4)	Year 4 (P5)	Year 5 (P6)	Year 6 (P7)	Year 7 (NA / Y8)	Year 8 (S1 / Y9)	Year 9 (S2 / Y10)	Year 10 (S3 / Y11)	Year 11 (S4 / Y12)	Year 12 (S5 / Y13)	Year 13 (S6 / Y14)
Girls															
Boys															

B-05. Are you a Prep school that teach Year 7 and 8 (Year 8-9 in NI) but not the other Senior years? ⓘ (For later questions where we split out numbers by Nursery, Junior, Senior, and Sixth Form, we ask you to put all your numbers in Junior.) Information on the following questions about the pupils may be gathered from your administration team.

☐ Yes

☐ No

B-06. Do you provide sixth form services but include reporting as part of the Senior school? ⓘ

☐ Yes

☐ No

JS

B-07. What is the total full time equivalent pupil capacity for each age group as at 1 September 2025? ⓘ

	Total
Nursery	
Junior	
Senior	
Sixth Form	
Total	

.....

B-08. Of all new pupils that have joined as at 1 September 2025 where have they moved from? ⓘ

Information on the following questions about the pupils may be gathered from your administration team.

	Junior	Senior	Sixth Form
Independent Sector			
State Sector			
Nursery or no previous education			
Overseas			

Unknown			
Other			

B-09. If applicable, what is the destination of Senior leavers (pre sixth form equivalent education) for the school year ending 31 August 2025? ⓘ

Information could be found by the Person(s) in charge of admissions for senior school (if applicable)

	Number of Pupils
Stay in school for sixth form (if available)	
Sixth form in group school (for groups of schools)	
Sixth form in competitor school	
Sixth form in state sector	

Training or apprenticeships

Unknown / other

Total

B-10. Does the school provide sixth form equivalent education? ⓘ

If your school has the facility to provide Sixth Form or equivalent education services e.g. Sixth Form, S6 or part of the Senior School teaching up to age 18, please select “yes” to this question and input your data in the question that appear.

Information could be found by the Person(s) in charge of admissions for senior school (if applicable)

☐ Yes

☐ No



How many subjects are on offer for sixth form of equivalent education? ⓘ

Information could be found by the person(s) in charge of admissions for Sixth Form (if applicable)

What was the destination of Sixth form leavers for the school year ending 31 August 2025? ⓘ

Information could be found by the person(s) in charge of admissions for Sixth Form (if applicable)

	Number of Pupils
Oxford or Cambridge University	
Russell Group universities (Excluding Oxford and Cambridge)	
Other higher education institutions	
Training or apprenticeships	

Unknown	
Other	
Total	

For the question below, please answer if you have the information readily available. We understand that this data may not be commonplace but we are attempting to build a rounder picture of the Independent School sector to aid your assessment of your schools' position regarding the intake of pupils and give Schools the ability to easily assess this if this is an area currently reported on, or a potential future benchmarking figure. **If you do not have this information, please leave blank.**



B-11. What is the total number of Non-British (including Northern Ireland) pupils in the school as at 1 September 2025? ⓘ

Information on the following questions about the pupils may be gathered from your administration team.

How many Non-British pupils (including Northern Ireland) have parents overseas as at 1 September 2025? ⓘ

Information on the following questions about the pupils may be gathered from your administration team.

You have reached the end of section B

Please click on the "Next" button in the bottom right hand corner of the page to complete section B and store your answers

A tick will appear next to the section name in the floating navigator on the left of the page

Alternatively, select "return to contents page". This will also save your inputs but not mark the section as complete

You are able to amend your answers at any point until the survey is finally submitted

End of Block: Pupils

Start of Block: Marketing

Section C: Marketing and Attraction

This section is designed so that a School can easily view the admissions funnel in a graphical form.

The intention is that this item can be used by admissions boards to clearly see numbers applying and moving through the process and if the School wishes, assess their rates of application against other Schools of their choosing. In addition, the section records the attrition rate of pupils to give the School greater understanding of pupil turnover.

All inputs that can not be filled in can be left blank

You are asked for details of the previous academic year as questions marked “as at 31 August 2025” and for the current academic year marked, “as at 1 September 2025” For schools in Scotland, please take these dates to mean the end and beginning of your school year, which will normally change around mid-August.

Source (s) of information we expect to be useful in completing this section

- The Admission department
-

C-01. If you do not hold the below information please select your answer and skip this question.

You can come back and untick this box before submitting in order to fill in the question below. If you do have the information available in the school, please select that option even if you skip adding the numbers to this section.

- ☐ I do not hold the information to answer the below question.
- ☐ I do have this information, see below
-

C-02. Admissions information relating to places in the current school year from 1 September 2025 ⓘ

Junior start Reception in England and P1 in Scotland and Northern Ireland.

Senior start Year 7 in England, S1 in Scotland, and Year 8 in Northern Ireland.

Sixth Form start Year 12 in England, S5 in Scotland, and Year 13 in Northern Ireland.

Information for this section may be found from your admissions team.

	Nursery	Junior	Senior	Sixth Form
Enquiries received				
Visits (open days and others)				
Applications received				

Assessments booked				
Assessments attended				
Offers extended				
Offers accepted				
New pupils started (1 Sep 2025)				

C-03. Pupil figures from September last year to 31 August 2025 ⓘ

Information for this section may be found from your admissions team.

	Nursery	Reception	Junior	Senior	Sixth Form
Number of new pupils at the start of the school year (1 September 2024)					
Number of new pupils that completed the year (to 31 August 2025)					

You have reached the end of section C

Please click on the "Next" button in the bottom right hand corner of the page to complete section C and store your answers

A tick will appear next to the section name in the floating navigator on the left of the page

Alternatively, select "return to contents page". This will also save your inputs but not mark the section as complete

You are able to amend your answers at any point until the survey is finally submitted

End of Block: Marketing

Start of Block: Surplus

Section D: Surplus

This section contains questions regarding your school's surplus and how the Board deals with surplus funds. Please answer all questions in GBP unless otherwise specified.

If your accounting year is not aligned with the school year, that is, it does not end on 31 August (England and NI) or around 31 July (Scotland), please specify this in the accounting year question below. This data will be presented for your School in the Data

Navigator dashboard however for the completion of the survey please complete all questions marked as the 31 August 2025 with figures from to your School's accounting year.

Source(s) of information we expect to be useful in completing this section

- Annual accounts
- Statement of Financial Activity if available

D-01. Accounting Year If your accounting year does not match with your academic year as at the 31 August 2025 (or 31 July in Scotland), please select your accounting year end below. ⓘ *Please note that this date is recorded but does not change the title for questions that state the "accounting year as at 31 August 2025"*

JS

D-02. What is your total net Statement of Financial Activities (SoFA) / Profit and Loss?

Information may be found in your annual accounts

	Annual Total
SoFA / Net Income	



D-03. Please provide the high level breakdown of your net Statement of Financial Activities (SoFA) / Profit and Loss? ⓘ

The total should sum to the SoFA entered for the question above.

Please **enter total expenditure** as a **negative** number so the total sums correctly. For investments and tax, these should be entered as a negative or positive number depending on the value in your school's accounts.

If your school does not pay any tax, please enter 0.

Information may be found in your annual accounts

	Annual Total
Total income	
Total expenditure	

-Losses / gains on investments

Tax paid

Total



D-04. What is the board's policy or budget on target surplus level as a percentage of net fees? ⓘ Surplus is defined as SoFA less depreciation.

	Percentage
Target surplus	

D-05. What amount of the reserve is held in cash? ⓘ

Information may be found from your finance department

	Total
Cash reserve	

You have reached the end of section D

Please click on the "Next" button in the bottom right hand corner of the page to complete section D and store your answers

A tick will appear next to the section name in the floating navigator on the left of the page

Alternatively, select "return to contents page". This will also save your inputs but not mark the section as complete

You are able to amend your answers at any point until the survey is finally submitted

End of Block: Surplus

Start of Block: Income

JS

Section E: Income

This section contains questions regarding income, broken down into fees, concessions, investments and various other forms of income.

Please provide answers for the previous accounting year as at the 31 August 2025. For schools in Scotland, your accounting year may well end 31 July 2025 - that is fine: please take that as your date regardless of the label and apply no adjustments

If your accounting year is not aligned with the school year, that is, it does not end on 31 August (England and NI) or around 31 July (Scotland), please specify this in the question in the previous section. This data will be presented for your School in the Data Navigator dashboard however for the completion of the survey please complete all questions marked as the 31 August 2025 with figures from to your School's accounting year.

Please answer all questions in pounds sterling (GBP) unless otherwise specified and if any answers are not applicable please leave these blank.

For detailed information on the splits of boarding type, please refer to the Data Navigator Guide, for quick reference, these are stated below;

Day Pupils - Do not stay on the premises overnight

Flexible - Up to and including 3 days boarding

Full / Weekly - Over 3 days boarding

Source(s) of information we expect to be useful in completing this section

- Annual accounts

For detailed information on the splits of pupil type, please refer to the Data Navigator Guide, for quick reference, these are stated below; **Nursery** - Pre-School **Junior** - Reception to Year 6 (P1 to P7 in Scotland and Northern Ireland) **Senior** - Year 7 to

Year 11 (S1 to S4 in Scotland; Year 8 to 14 in Northern Ireland) (Note that we apply the convention that there is no Year 7 equivalent in Scotland to keep S5 to S6 aligned with English sixth form and with Northern Ireland Year 13 to 14.) **Sixth Form** - Year 12 to 13 in England (S5 to S6 in Scotland; Year 13 to 14 in Northern Ireland)

E-01. 31 August 2025 Accounts: Total income ⓘ The inputs for this question should come from the income section of your Statement of Financial Activities / Comprehensive Income.

Please ensure the total below sums up to the total income you entered in the previous section (Section D):

£\${surplus_sofa_summary/ChoiceNumericEntryValue/7/12}.

*The number in bracket, eg "(E-02)" are the numbers of the questions that you can enter the detailed breakdown of these total figures
Information for this section could be found on your annual accounts or your own break down of income*

	Total amount in £'s
Gross fees (E-02)	
Concessions (E-03)	
Non-tuition fee income (E-04)	

Trading income (E-06)	
Donations (E-07)	
Investment Income (E-08)	
Other	
Total	

E-02. Fees - Gross Income to 31 August 2025 ⓘ

Nursery - Pre-School

Junior - Reception to Year 6 (P1 to P7 in Scotland and Northern Ireland)

Senior - Year 7 to Year 11 (S1 to S4 in Scotland; Year 8-14 in Northern Ireland) (Note that we apply the convention that there is no Year 7 equivalent in Scotland to keep S5 to S6 aligned with English sixth form and with Northern Ireland Year 13 to 14.)

Sixth Form - Year 12 to 13 in England (S5-S6 in Scotland; Year 13 to 14 in Northern Ireland) The total for this question should equal the gross fees entered in the total income question (E-01) above.

Information for this section could be found on your annual accounts or your own break down of income

	Nursery (Full Time)	Junior	Senior	Sixth Form
Day fee				
Up to and including 3 days boarding (Flexi)				

Over 3 days boarding (Full)				
Registration				
Total				

E-03. Concessions for the last accounting year to 31 August 2025 ⓘ The total for this question should equal the concession entered in the total income question (E-01) above.

Information for this section could be found on your annual accounts or your own break down of income

	Number Offered	Total Amount in GBP
Bursaries		
Scholarships		
Staff discount		
Sibling discount		

Armed forces discount		
Other discount		
Total if you do not have a breakdown		
Total		

E-04. Non-tuition fee income to 31 August 2025 ⓘ The total for this question should equal the non-tuition fee income entered in the total income question (E-01) above.

Information for this section could be found on your annual accounts or your own break down of income

	Total Net Amount in GBP
Bus services	
Shop sales and commission (Uniform, equipment etc)	
School meals - where billed separately	
Wrap around care (Holiday/before and after school clubs and activities)	

Other

Total

E-05. Suggested items for the "Non-tuition fee income" section ⓘ

Please provide feedback and suggestions here if there are any other income categories that are important for you to benchmark your school.

E-06. Trading income to 31 August 2025 ⓘ

The total for this question should equal the trading income entered in the total income question (E-01) above.

Information for this section could be found on your annual accounts or your own break down of income

	Total Net Amount in GBP
Facilities - Rentals and lettings	
Other (including deposits retained)	
Total	

JS

E-07. Donations for the last accounting year to 31 August 2025 ⓘ Fundraising and donations include all voluntary income. Please provide net numbers here and the cost of fundraising in the Expenses / Sales, Marketing and Fundraising section. The total for this question should equal the donations entered in the total income question (E-01) above.

Information for this section could be found on your annual accounts or your own break down of income

	Total Net Amount
Fundraising and donations	
Grants	
Other	
Total	

JS

E-08. Investments income for the last accounting year to 31 August 2025 ⓘ

Information for this section could be found in your annual accounts or your own break down of income

	Total Gross Amount
Bank interest	
Dividends	
Other	
Total	

You have reached the end of section E

Please click on the "Next" button in the bottom right hand corner of the page to complete section E and store your answers

A tick will appear next to the section name in the floating navigator on the left of the page

Alternatively, select "return to contents page". This will also save your inputs but not mark the section as complete

You are able to amend your answers at any point until the survey is finally submitted

End of Block: Income

Start of Block: Expenditure

JS

Section F: Expenditure

This section contains questions regarding expenditure, broken down into staff costs, running costs and various financial costs. The aim of this section is to visualise all expenditure of the School to enable self analysis and a comparison with peers across a variety of filtered options.

Please provide answers for the previous accounting year as at the 31 August 2025. For schools in Scotland, your accounting year may well end 31 July 2025 - that is fine: please take that as your date regardless of the label and apply no adjustments

If your accounting year is not aligned with the school year, that is, it does not end on 31 August (England and NI) or around 31 July (Scotland), please specify this in the question in the previous section. This data will be presented for your School in the Data Navigator dashboard however for the completion of the survey please complete all questions marked as the 31 August 2025 with figures from to your School's accounting year.

Please answer all questions in pounds sterling (GBP) unless otherwise specified and if any answers are not applicable please leave these blank.

We note that many Schools employ staff via the School's payroll and also employ staff via agencies. It is for this reason that separate questions are presented for each expenditure section. Due to the differences in expense requirements for these two cohorts, additional information has been requested for payroll staff. In this section please enter **expenditure** items as **positive** numbers.

Source(s) of information we expect to be useful in completing this section

1. Annual accounts
2. Your own Schools method of recording the break down of expenditure

F-01. 31 August 2025 Accounts: Total expenditure ⓘ

The inputs for this question should come from the expenditure section of your Statement of Financial Activities / Comprehensive Income.

Please ensure the total below sums up to the total expenditure you entered in the Surplus section (Section D): £\$e{-q://QID1217119500/ChoiceNumericEntryValue/9/12}.

Please ensure the total below sums up to the total expenditure from your accounts.

*The number in bracket, I.E. "(Q37)" are the numbers of the questions that you can enter the detailed breakdown of these total figures
Information for this section could be found on your annual accounts or your own break down of expenditure*

	Total amount in £'s
Staff costs - (Q41 + Q42)	
Depreciation	
Other teaching (excl. staff)	

Premises (Q44)

Welfare (Q45)

Administration (Q46)

Coach hire

Governance & legal (Q47)

Interest / finance costs (Q48)

Other	
Total	

Staff costs

For detailed information on the splits of Staff groups, please refer to the Data Navigator Guide, for quick reference, these are stated below;

Teaching Staff: All staff that directly provide academic, vocational or sporting teaching to students (Teachers, Coaches) **Teaching**

Support Staff: All staff that directly assist in the delivery of teaching (Teaching assistants, Lab technicians, Sport Equipment Assistants)

Non-teaching staff: All staff that participate in roles that are not directly educational (Groundskeepers, Drivers, internal Kitchen Staff, Admissions, Finance, Administrators, Medical, Residential Boarding)

F-02. What are the total staff costs in GBP for employees on the Schools payroll, in the previous accounting year to 31 August 2025? ⓘ Please enter the amount as a number without the '£' symbol and without commas as thousands separators.

	Salary	National Insurance	Pension	Benefits in kind (e.g car, medical, accommodation)
Teaching staff				
Teaching Support staff				
Non-teaching staff				
Total				

F-03. What are the total agency staff costs in GBP for those not on the Schools payroll in the previous accounting year to 31 August 2025? ⓘ

	Amount invoiced to 31 August 2025
Teaching staff	
Teaching Support staff	
Non-teaching staff	
Total if breakdown is unknown	

Total

JS

F-04. What was the average number of full-time equivalent (FTE) staff removing duplicates at the school over the previous accounting year to 31 August 2025? ⓘ

Information for this section could be found on your annual accounts, HR or payroll systems, or your own break down of expenditure

	Number on Payroll	Off payroll
Teaching staff		
Teaching Support staff		
Non-teaching staff		
Total		

F-05. What was the turnover rate % of full-time equivalent (FTE) staff at the school over the previous accounting year to 31 August 2025? ⓘ This may be in your HR or payroll systems. It is perfectly fine to provide an estimate - this is for benchmarking purposes.

A reasonable definition is the number of new starters in the year divided by the average number of staff over the year (from the previous question).

	Turnover rate %
Teaching staff	
Teaching Support staff	
Non-teaching staff	

F-06. Premises costs ⓘ

All costs are exclusive of staff costs (which are captured separately). This should include all aspects of maintenance for School buildings. The total for this question should equal the Premise cost entered in the total expenditure question (F-01) above.

Information for this section could be found on your annual accounts or your own break down of expenditure

	Annual Total
Electricity	
Gas and other fuels	
Internet and Phone	
Water	

Waste

Other premises costs

Total

F-07. Welfare costs ⓘ

All costs are exclusive of staff costs (which are captured separately). Catering costs and costs to provide pupil welfare and safeguarding services. The total for this question should equal the welfare cost entered in the total expenditure question (F-01) above. Information for this section could be found on your annual accounts or your own break down of expenditure

	Annual Total
Food	
Outsourcing catering costs	
Other internal items relating to the provision of catering	
Other welfare costs	

Total

F-08. Administration costs ⓘ

(Fundraising net amounts are captured in the Income section and include donations and other voluntary income.)

All costs are exclusive of staff costs (which are captured separately).

Consumables and other general and administration non-staff costs including Sales, Marketing and Fundraising costs.

The total for this question should equal the administration cost entered in the total expenditure question (Q40) above.

Information for this section could be found on your annual accounts or your own break down of expenditure

	Annual Total
Cost of fundraising	
Advice, design, other services	
Online website and webservices	

Production, printing, distribution

Advertising

Other administration costs

Total

F-09. Governance and Legal costs ⓘ

For detailed information on the breakdown of governance and legal, please refer to the Data Navigator Guide, for quick reference, these are stated below;

Annual Audit - All costs associated with the Auditing process

Governance - Staff, legal costs, board, memberships such as AGBIS

Governors Expenses - Travel for attendance of training or meetings if expensed

Training costs - Room, educator, and similar charges for Governor's training sessions

The total for this question should equal the governance & legal costs entered in the total expenditure question (Q40) above.

Information for this section could be found on your annual accounts or your own break down of expenditure

	Annual Total
Annual Audit	
Governance	

Governors Expenses	
Training costs	
Other	
Total	

F-10. Interest cost of Borrowing in the last accounting year to August 2025

For **short term borrowing** this means those repayable in 12 months or less.

For **long term borrowing** this means those repayable in more than 12 months. Please enter capital repayments in the following section, Other financial information. The total for this question should equal the interest / finance cost entered in the total expenditure question (Q40) above. Information for this section could be found on your annual accounts or your own break down of expenditure

	Annual Total
Short term borrowing interest	
Long term borrowing interest	
Total	

Business Rates (Non-domestic Rates) We ask these questions about business rates to track the impact of the loss of business rates relief in England and Wales. See also <https://www.gov.uk/introduction-to-business-rates/how-your-rates-are-calculated> for more information for England and <https://www.gov.scot/policies/local-government/non-domestic-rates/> for Scotland.

F-11. What is your current rateable value for the purposes of business rates? ⓘ See also <https://www.gov.uk/introduction-to-business-rates/how-your-rates-are-calculated> for more information for England and <https://www.gov.scot/policies/local-government/non-domestic-rates/> for Scotland.

F-12. How much do you pay in business rates? ⓘ English charities would normally get 80% relief on business rates and there are other reliefs available for non-charities. See also <https://www.gov.uk/apply-for-business-rate-relief>. There are different reliefs for Scotland. Here, we are asking for the amount you are paying.

You have reached the end of section F

Please click on the "Next" button in the bottom right hand corner of the page to complete section F and store your answers

A tick will appear next to the section name in the floating navigator on the left of the page

Alternatively, select "return to contents page". This will also save your inputs but not mark the section as complete

You are able to amend your answers at any point until the survey is finally submitted

End of Block: Expenditure

Start of Block: Other financial information

JS

Section G: Other financial information

This section contains questions regarding other financial information not covered under income and expenditure. The aim of this section is to visualise other financial information of your School to enable self analysis and a comparison with peers across a variety of filtered options.

Please provide answers for the previous accounting year as at the 31 August 2025. For schools in Scotland, your accounting year may well end 31 July 2025 - that is fine: please take that as your date regardless of the label and apply no adjustments

If your accounting year is not aligned with the school year, that is, it does not end on 31 August (England and NI) or around 31 July (Scotland), please specify this in the question in the previous section. This data will be presented for your School in the Data Navigator dashboard however for the completion of the survey please complete all questions marked as the 31 August 2025 with figures from to your School's accounting year.

Please answer all questions in pounds sterling (GBP) unless otherwise specified and if any answers are not applicable please leave these blank.

Source of information we expect to be useful in completing this section Information

- Annual accounts
-

School Fees

G-01. Fees - Current academic year from 1 September [2025](#) ⓘ

Nursery - Pre-School **Junior** - Reception to Year 6 (P1 to P7 in Scotland and Northern Ireland)

Senior - Year 7 to Year 11 (S1 to S4 in Scotland; Year 8 to 14 in Northern Ireland) (Note that we apply the convention that there is no Year 7 equivalent in Scotland to keep S5-S6 aligned with English sixth form and with Northern Ireland Year 13 to 14.)

Sixth Form - Year 12 to 13 in England (S5 to S6 in Scotland; Year 13 to 14 in Northern Ireland) Information for this section may be found on your annual accounts or your own break down of fees

	Nursery (Full Time)	Junior Min	Junior Max	Senior Min	Senior Max	Sixth Form
Day pupils						
Flexi (Up to and including 3 days						

boarding)						
Full / Weekly (Over 3 days boarding (Full)						

G-02. Fees - Previous academic year to 31 August [2025](#) [i](#)

Nursery - Pre-School **Junior** - Reception to Year 6 (P1 to P7 in Scotland and Northern Ireland)

Senior - Year 7 to Year 11 (S1 to S4 in Scotland; Year 8 to 14 in Northern Ireland) (Note that we apply the convention that there is no Year 7 equivalent in Scotland to keep S5 to S6 aligned with English sixth form and with Northern Ireland Year 13 to 14.)

Sixth Form - Year 12 to 13 in England (S5-S6 in Scotland; Year 13 to 14 in Northern Ireland) Information for this section may be found on your annual accounts or your own break down of fees

	Nursery (Full Time)	Junior Min	Junior Max	Senior Min	Senior Max	Sixth Form
Day pupils						
Flexi (Up to and including 3 days boarding)						

Full / Weekly (Over 3 days boarding (Full))						
--	--	--	--	--	--	--

G-03. Fee concessions for staff ⓘ

For detailed information on the splits of Staff cohorts, please refer to the Data Navigator Guide, for quick reference, these are stated below;

Teaching Staff: All staff that directly provide academic, vocational or sporting teaching to students (Teachers, Coaches)

Teaching Support Staff: All staff that directly assist in the delivery of teaching (Teaching assistants, Lab technicians, Sport Equipment Assistants)

Non-teaching staff: All staff that participate in roles that are not directly educational (Groundskeepers, Drivers, internal Kitchen Staff, Admissions, Finance, Administrators, Medical, Residential Boarding) Information for this section may be found on your annual accounts or your own break down of fees

	Percentage
Fee concessions for teaching staff	
Fee concessions for teaching support staff	

Fee concessions for non - teaching staff

CAPEX

G-04. Capital Expenditure ⓘ

Information for this section may be found in

Annual accounts

	Previous year to 31 August	Current year to 31 August 2025	Next year	In 2 years	In 3 years	In 4 years
Building						
IT						
Fixtures and Fittings						
Motor						

Vehicles						
Total						

Finance costs

Please provide as per the last accounting period to the 31 August [2025](#). The inputs can be an estimate, however please ensure these are as close as possible to actual costs

G-05. Cost of Short Term Borrowing in the last accounting year to August 2025 – repayable in 12 months or less ⓘ Short term borrowing is borrowing that is repayable in 12 months or less. The cost of interest should be entered in the previous section, Expenditure.

	Annual Total
Capital repayments	
Other fees (including arrangement)	
Total	

G-06. Cost of Long Term Borrowing in the last accounting year to 31 August 2025 - repayable in more than 12 months Long term borrowing is borrowing that is repayable in more than 12 months. The cost of interest should be entered in the previous section, Expenditure.

	Annual Total
Capital repayments	
Other fees (including arrangement)	
If split unknown, total	
Total	

You have reached the end of section G

Please click on the "Next" button in the bottom right hand corner of the page to complete section G and store your answers

A tick will appear next to the section name in the floating navigator on the left of the page

Alternatively, select "return to contents page". This will also save your inputs but not mark the section as complete

You are able to amend your answers at any point until the survey is finally submitted

End of Block: Other financial information

Start of Block: Pensions

Section H: Pensions and benefits

This section contains questions regarding your School's pensions and benefits provisions for pay-rolled staff. Dependant on your answers, you will be directed through a series of questions that cover your school's membership of the TPS

or equivalent, and Defined Contribution pension provision. Your answers will create a set of benchmark data that you will be able to use to analyse your school's position against peers to assist in ongoing future business decisions.

Dependent on your answers, different questions will appear, this means that the numbering may not be linear, for example you may answer question 60, 63 and 72 as part of the path relevant to your school. All questions are available with their associated number references in the guidance document.

Source (s) of information we expect to be useful in completing this section

- Bursar Payroll Team
- Member Booklets

H-01. What benefits do you offer to payroll staff? Please select all that apply at the beginning of the [2025](#) school year

Your HR or benefits manager should have this information. Complete as best you can - we suggest not spending too long on this question. Benefits are, for some schools, increasingly seen as competitive elements in a total rewards package, so we are providing this optional list for basic benchmarking. Please select all that apply for new starters. Where it applies to *some* starters, use your best judgement or select the option if it applies to most.

	Teaching staff	Teaching support staff	Non-teaching staff
1.1.1 Employee well-being and assistance scheme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.1.2 Free or subsidised gym	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2.1 Critical illness insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2.2 Income protection insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2.3 Personal accident insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1.3.1 Traditional Private Medical Insurance (PMI)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3.2 Medical cash plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3.3 Other medical cover (not PMI or Cash Plan)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3.4 Dental insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3.5 Optical insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.4 Other health and wellbeing benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.1 Free parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.2 Cycle to work scheme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.3 Electric charging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.4 Electric car scheme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.5 Free travel on school coaches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.6 Other travel benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.1 Life insurance or Death in service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2 Shopping discounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3 Free lunch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.4 Long-term service awards (monetary or sabbatical)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3.5 Staff
accommodation - free
or subsidised

☐
☐
☐

3.6 Staff laptops,
iPads or similar

☐
☐
☐

3.7 Other financial
benefits

☐
☐
☐

Other benefits

☐
☐
☐

H-02. Is the school a member of the TPS (Teachers' Pension Scheme) or equivalent for other UK regions as at 1 September 2025? ⓘ
Regional equivalents include STPS, STSS, NITPS and others. This information may come from the bursar or payroll team

☐ Yes

☐ No

H-03. Has your School commenced a cost mitigation strategy in relation to the TPS or equivalent as at 1 September 2025? ⓘ

Regional equivalents include STPS, STSS, NITPS and others. Strategies may include implementing a parallel option, phased withdrawal or cost sharing. This information may come from the bursar or payroll team

☐ Yes

☐ No

H-04. Has your School ever been a member of the TPS or equivalent? 2025? ⓘ Regional equivalents include STPS, STSS, NITPS and others. This information may come from the bursar or payroll team

☐ Yes the School has in the past

☐ No the School has never been a member

H-05. Do you envisage your School participating in the TPS or equivalent in 1, 5 and 10 years time? ⓘ

This information may come from the bursar or payroll team

	Yes	No
1 Years Time	<input type="radio"/>	<input type="radio"/>
5 Years Time	<input type="radio"/>	<input type="radio"/>
10 Years Time	<input type="radio"/>	<input type="radio"/>

H-06. At the time of completion, are you currently engaging in discussion of a cost mitigation strategy in relation to the TPS or equivalent? ⓘ

This information may come from the bursar or payroll team

☐ Yes

☐ No

H-07. If considering exit or partial exit, which form are you envisaging engaging with? ⓘ

You are able to select more than one answer below if applicable to your School's current position.

This information may come from the bursar or payroll team

- ☐ Full Exit
 - ☐ Paralel Option
 - ☐ Phased Withdrawal
 - ☐ Cost Sharing
 - ☐ Undecided
-

H-08. If known, what is your estimated overall target benefit spend to the TPS or equivalent as a percentage of salary? ⓘ

This percentage will cover pension contribution and any supplementary benefits such as life assurance

Please select one answer from the list

☐

☐ 16% to 20.9%

☐ 21% to 24.9%

☐ 25% to 29.9%

☐ ≥30%

H-09. Of existing and eligible staff, how many are enrolled in the TPS (or equivalent) as a percentage? ⓘ

This information may come from the bursar or payroll team

_____ 10

H-10. What was your School's date of exit from the TPS or equivalent? (Please use DD/MM/YYYY format) ⓘ This information may come from the bursar or payroll team

H-11. Does your School operate Phased Withdrawal as at 1 September 2025? ⓘ This information may come from the bursar or payroll team

☐ Yes

☐ No

H-12. What was your School's date of implementation? (Please use DD/MM/YYYY format) ⓘ This information may come from the bursar or payroll team

H-13. Does your School operate Cost Sharing as at 1 September 2025? ⓘ This information may come from the bursar or payroll team

☐ Yes

☐ No

H-14. What was your School's date of implementation? (Please use DD/MM/YY format) ⓘ This information may come from the bursar or payroll team

H-15. Which model of cost sharing is operated? ⓘ This information may come from the bursar or payroll team

- ☐ Passing on cost to teachers via reduction of pensionable salary
 - ☐ Have taken steps to fix / cap pension spend in relation to future contribution rate changes
 - ☐ Implemented a pay freeze or a reduced pay increase
 - ☐ Something else
-

H-16. Does your School operate a Parallel Option DC scheme as at 1 September 2025? ⓘ This information may come from the bursar or payroll team

- ☐ Yes
 - ☐ No
-

H-17. What was your School's date of implementation? (Please use DD/MM/YYYY format) ⓘ This information may come from the bursar or payroll team

H-18. Do you provide an option for teachers to receive a lower employer pension contribution to the DC arrangement and instead receive a non pensionable cash allowance as at 1 September 2025? ⓘ

This information may come from the bursar or payroll team

☐ Yes

☐ No

H-19. Please provide the below percentages in relation to the Cash Allowance ⓘ This information may come from the bursar or payroll team

☐ Maximum School Contribution _____

☐ Maximum Cash Allowance _____

H-20. Do you operate a different overall benefit spend for new starters?

☐ Yes

☐ No

H-21. What is your overall benefit spend for new starters? ⓘ

This percentage will cover pension contribution and any supplementary benefits such as life assurance

Please select one answer from the list

☐

☐ 16% to 20.9%

☐ 21% to 24.9%

☐ 25% to 29.9%

☐ ≥30%

H-22. Do you have separate DC pension providers for Teachers and pay rolled Support Staff as at 1 September 2025? ⓘ This information may come from the bursar or payroll team

☐ Yes

☐ No

H-23. Please select the teacher's DC provider from the lists as at 1 September 2025? ⓘ This information may come from the bursar or payroll team

▼ Prefer not to say ... Other

H-24. Please select the Support Staff's DC provider from the lists as at 1 September 2025? ⓘ This information may come from the bursar or payroll team

▼ Prefer not to say ... Other

H-25. Do you have separate contribution structures for Teachers and Support Staff? as at 1 September 2025? ⓘ This information may come from the bursar or payroll team

☐ Yes

☐ No

H-26. What is the Teacher's DC default contribution structure? (Please answer as a percentage) ⓘ This information may come from the bursar or payroll team

☐ Employer Default Rate % _____

☐ Employee Default Rate % _____

H-27. What is the Support Staff's DC default contribution structure? (Please answer as a percentage) ⓘ This information may come from the bursar or payroll team

☐ Employer Default Rate % _____

☐ Employee Default Rate % _____

End of Block: Pensions

Start of Block: Submit

Submit

You are about to submit your answers.

Please ensure that you are happy with all of your answers before you continue.

You can use the "previous" button in the bottom left hand corner to go back through and review your inputs, or use the table of content navigator on the left of your screen.

If you have submitted accidentally or wish to update your information, please contact the Data Navigator Team at DataNavigator@barnett-waddingham.co.uk and the team will allow access back into the survey.

Once you are happy please click the, "Submit" button in the bottom right hand corner to submit your answers.

You will be taken to an exit page where you will be able to download a PDF copy of your answers for your reference.

Thank you from the Data Navigator team for taking part

Checks

The following checks show you whether the sum of the components which make up a particular total equal the number entered for that total. For example, the components of total income sum to same value entered for total income. You should aim for all rows of the **Difference column to be zero**.

	Inputted value	Sum of components	Difference
Surplus		0	0
Total Income		0	0
Total Expenditure	-0	0	0

Next Steps We will run a few checks on your data and be in touch if we have any questions. The dashboard will be available shortly after the deadline for submissions closes and you should receive access during the first week of March or earlier.

Access to the interactive dashboard is provided through Barnett Waddingham's secure online portal called ClarityBW. If you do not already have an account, then the Data Navigator team will set one up and email you instructions to complete the account

creation which will give you access to the tool. If you already have an account, then the team will email you once the new version of the tool is available to use.

The email will be sent to the email address that the survey invitation was originally sent to, if you wish to grant multiple users access to your School's data, the support team will be able to set these up for you, simply get in touch via DataNavigator@barnett-waddingham.co.uk.

End of Block: Submit