

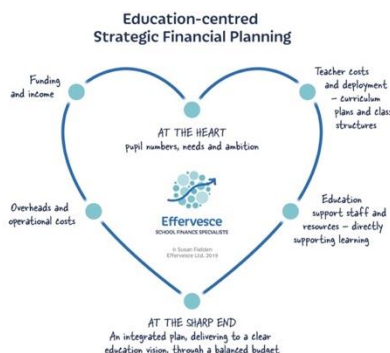
Embedding an education-centred approach to strategic financial planning

–a workshop for education, finance and business leaders in schools, academies and MATs .

21st January 2020 9.30 arrival for refreshments finish at 15.00pm

Outline

Strategic planning is one of those important things that gets pushed out by the urgent. It requires educated guesswork about the future and an assessment of the potential implications if that is wrong. But as every significant change takes about three years to implement successfully, failure to plan across the medium term makes it hard to get started with the big stuff. If you knew, as a school, academy or MAT leader, that in three years' time you would have implemented changes to bring greater curriculum and financial efficiency, having taken all key stakeholders with you along the way, wouldn't you want to start that planning now?



The workshop is based around the Effervesce framework, which holds pupils at the heart.

As teamwork is vital to an integrated approach, this workshop will usually include enough finance for educational leaders to be clear about balance and priorities and enough on curriculum and staff deployment for finance and business leads to understand where most of the money goes. For some teams, the challenge is about approach and process, for some there is a need for spreadsheets, whilst others are looking for new ways to balance needs and resources.

The workshop framework is flexible enough to respond to a focus that suits the context, because every school, academy or MAT is different.

Outcomes and benefits

By the end of this workshop you will:

- ♥ feel more comfortable about forecasting future funding and income, clear about the key elements of school funding and known and possible changes in the future
- ♥ have tamed the uncertainty inherent in multi-year planning and be in a position to manage risks effectively
- ♥ know how to develop an integrated education and financial plan, as a team, that provides the strategic framework for annual budget, staffing and curriculum decisions and the basis for wider stakeholder engagement.

