

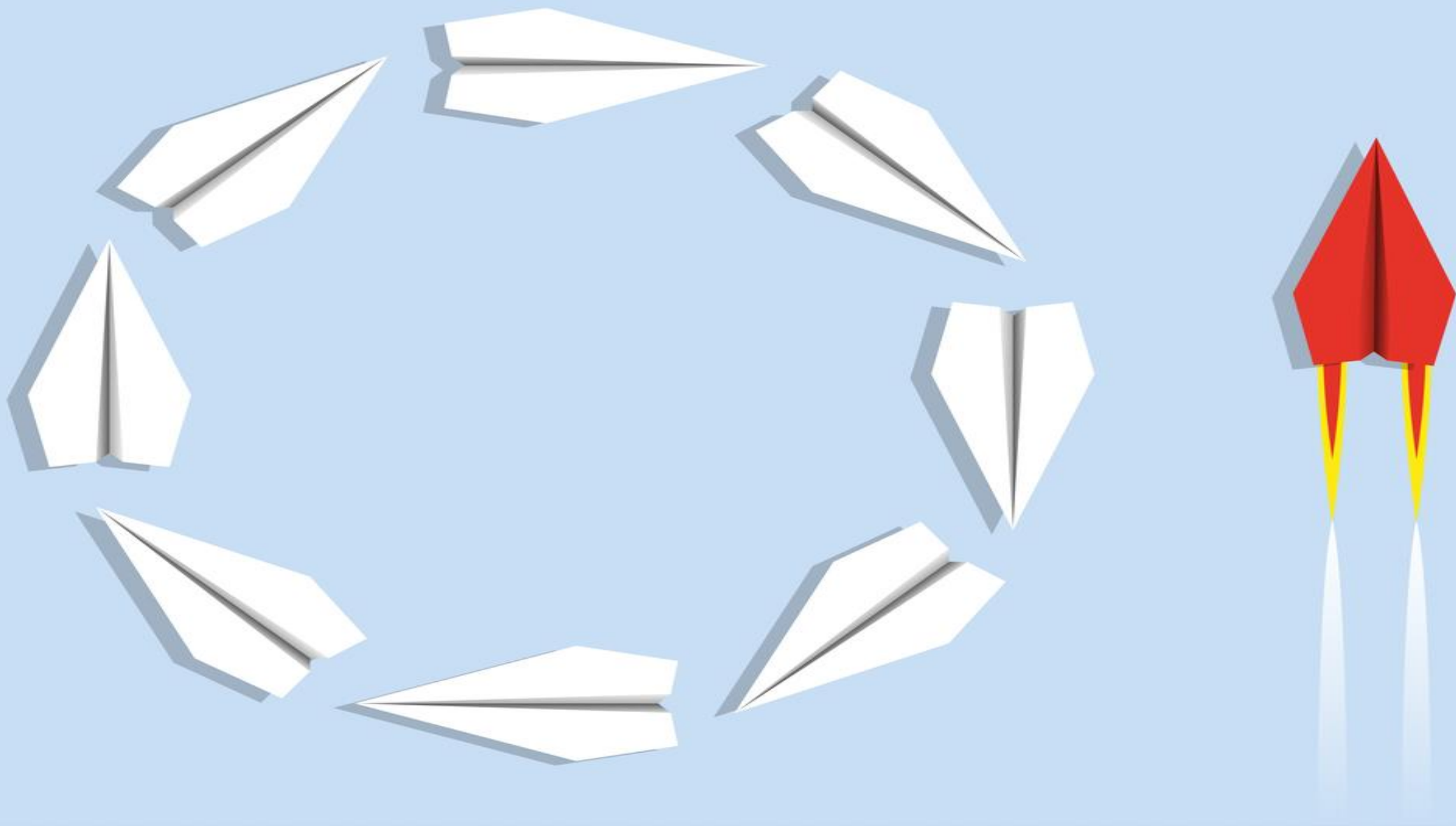


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Integrated curriculum and financial planning (ICFP) across a MAT



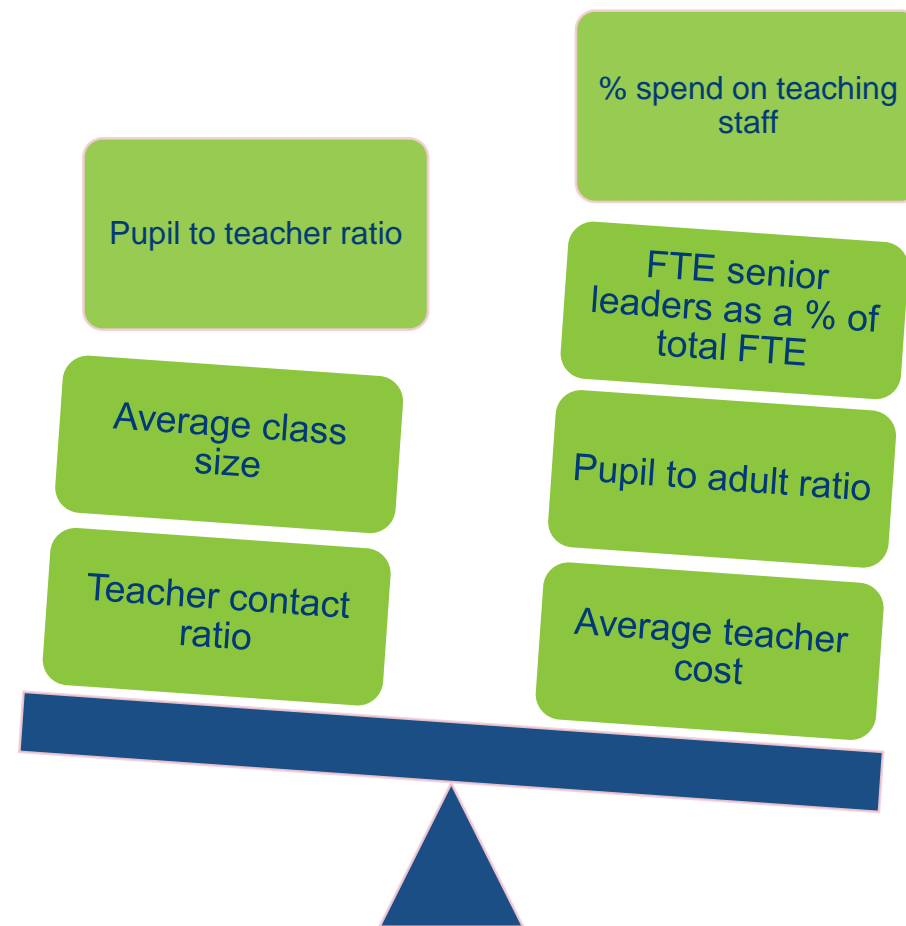


LEADING ON

ICFP – revision.....

Done well ICFP will link

- Performance
- People
- Resources
- Process
- Vision



Challenges

- Growth and challenges of the new : school/ pupils/ data/ staff
- Journey time
- Different phases
- Capacity
- Communication
- Fear of change

Have a plan



Bring together
the right team
with a clear and
transparent remit



Consider a
steering or
working group



3 -5 year plan
includes well
articulated
assumptions on a
range of triggers



Create a flexible
structure with
friendly feedback
loops!

Understand the starting point



What is the affordable PTR?

Does the curriculum meet the needs of pupils ?

Is the leadership structure “top heavy”/sustainable?

Is there any / further scope for economies in timetable delivery?

Is there any duplication of effort?



What are the projected pupil numbers for next 3/5 years?

Have all collaboration opportunities been explored / evaluated?

Is there a robust procurement strategy for ALL expenditure?

Is there a fully costed short/medium, medium/long term maintenance plan?

What does benchmarking tell us?

Is there potential to generate more income?

D. School characteristics

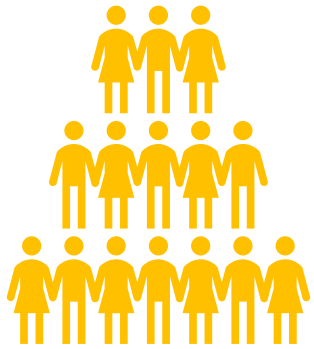
Average teacher cost (£)
Senior leaders as a percentage of workforce
Pupil to teacher ratio
Pupil to adult ratio
Teacher contact ratio (less than 1.0)
Predicted percentage pupil number change in 3-5 years
Average class size



A critical comparison : actual PTR V affordable PTR

PTR = pupil to teacher ratio

The affordable PTR is 16... what does that mean ?



500 pupils



PTR 16 = 1 teacher
for every 16 pupils



31.25 teachers FTE
(includes all staff paid as
teachers)

- So now you know this you need to work out how much teaching time 31.25 FTE teachers including the management team will provide
- Then you must reconcile that with your teacher deployment planning for the curriculum
- The **curriculum content** is less critical at this point than the **curriculum framework**!

Case study : A cross phase trust

Issue: Rural primary with 84 pupils and operating 4 classes.

Reducing to 3 classes would deliver an acceptable average class size of 28 and reduce the required FTE

Likely impact on educational outcomes ?

Consideration of pupil number forecasts?

Case study : Secondary only trust

Issue : Contact ratio of 0.59 in a secondary school.
Current staff deployment delivered 715 teaching periods with 48.5 teachers.

Increasing the contact ratio to 0.78 would deliver 946 teaching periods (with 48.5 teachers) or fewer teachers (about 37) could provide the 715 teacher periods on the current timetable.

Local context ?

Sharing staff across the trust?

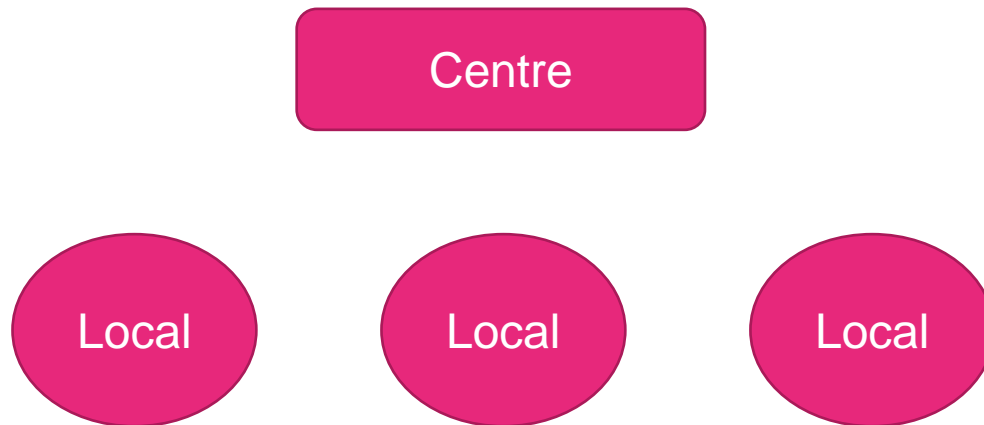
Curriculum review?

Understand what works well

(and don't be afraid to acknowledge what doesn't!)

Centralisation

the process by which the activities of an organisation, particularly those regarding planning and decision-making, framing strategy and policies become concentrated within a particular geographical location group.



What works well across a MAT

- *Where* the decisions are made must ensure the best outcomes for pupils
- Curriculum planning – don't spread staff too thinly or be too prescriptive
- Geography matters
- Staff well being matters

What works well across a MAT

- *Where* the decisions are made must ensure financial sustainability across the MAT or group of schools
- Each school should be financially viable in it's own right
- GAG pooling must evidence clear benefits at all levels
- Staff wellbeing matters

Where decisions are made

ICFP is about reconciliation between the needs of all the pupils across the MAT / group and the available resources. There are always options .

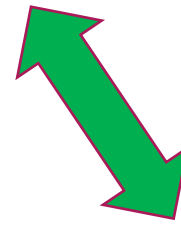
A trust has a centralised function that makes decisions about how many staff each school in the group can afford and issues the FTE's accordingly . Based on financial metrics only school X and school Y are each told they can have 50 FTE to deliver their curriculum.

School X , is really struggling to meet the needs of it's cohort with 50 teaching staff.

School Y, can manage quite easily with 50 teaching staff.

Option 1

Trust decision making process
incorporates consideration of local
context



School X
52 teachers

School Y
48 teachers

Reconciliation between curriculum and finance needs.
Overall the trust is viable but flexibility ensures the best outcomes for pupils

Option 2

Trust decision making is prescriptive
with little or no consideration of local
context

School X is in RI.
Being blind to the local
context, risks sustainability of
the trust as a whole



School X
50 teachers

School Y
50 teachers

Limits capacity of the trust to bring schools in and does not support
sustainable growth, which in turn could yield increased financial efficiency.

Example : A cross phase trust of 20+ schools

The Trust works effectively across two counties. The Trust operates three hubs to address the practicalities of the geographical spread whilst maintaining the benefits of consistency of trust wide policies and good practice.

All schools are charged 4% of core revenue funding. All schools benefit from a central function that delivers leadership of

Finance and operations including data and GDPR

Curriculum development and school improvement

Continued professional development

Human resources (including payroll services)

In addition, primary schools access IT support from staff employed at secondary schools in the trust.

Example : A cross phase trust of 8+ schools

The trust operates in one county where rurality and geography can be a challenge .

The central services function is run on an 'at cost' basis, and structural capacity means that individual school contributions are reducing as more schools join the MAT. Currently central functions represent around 8% of total expenditure (previously 10 – 11%).

The trust operates an effective central services function incorporating

Strategic leadership and governance

Curriculum planning and school improvement

IT

Apart from IT all schools benefit from these services. IT is currently run on an opt-in basis.

Final thoughts

- ICFP will not (and should not) tell you what to do, but it will provide a bank of information to inform decisions and the choices you make for the children and young people across your trust.
- The function of the budget is to reflect the trust's priorities. The budget plan serves the trust and not the other way round.
- The scheme of delegation rules!

Questions



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