

Effective financial management in uncertain times

Understand the implications of the National Funding Formula,
manage staff restructures and achieve efficiencies

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 #oeSBM

Expert speakers include:

Matthew Clements-Wheeler

Business Manager and Deputy Head, Bordesley Green Girls' School

Russell Dalton

Finance and Business Director, Pershore High School

Julia Harnden

ASCL Funding Specialist

KEY BENEFITS

SAVE COSTS

How to do more with less

NATIONAL FUNDING FORMULA

Clarity on the future of
education funding

GENERATE INCOME

Key pointers on grant
applications

Effective financial management in uncertain times

Understand the implications of the National Funding Formula, manage staff restructures and achieve efficiencies

Uncertainty remains around the future of school funding. But the decisions you make over the next year concerning your staffing structure, budget and with whom you collaborate all have a significant impact in the future.

Do you know how to approach a restructure effectively? Do you know how to forecast accurately during times of uncertainty? How are you working to do more with less in your organisation?

This timely and practical national conference will give you solutions to your most pressing challenges and the opportunity to network with your peers from across the country.

But this is no death-by-powerpoint event. Expect to be challenged and to participate in the day's interactive and practical workshops. Ensure you remain up-to-date and fully prepared to drive changes and efficiencies in your organisation.

Key focuses on the day include:

- know how to audit your staffing structures, assess affordability and carry out a compliant restructure
- learn how to build up scenarios and ensure accurate 3-5 year forecasting and budgeting
- develop a robust and strategic long-term premises management plan and learn how to raise funds
- take away practical techniques to support the wellbeing of you and your staff
- learn how to work with other schools, overcome competition and achieve value for money

Who should attend?

- School Business Managers
- Finance Directors
- Chief Finance Officers
- Bursars
- Headteachers

Unlimited CPD is here!

Optimus can offer you much more than a one-day conference. Become an Unlimited CPD member and gain access to a wealth of resources, model policies and in-house training to ensure your school or Trust's CPD offering is consistent, high-quality and has a genuine impact on school improvement.

Head to oego.co/SBMCPD to find out more.

This year's speakers include...



Sue Birchall

Business Manager, The Malling School

Sue is an experienced business manager with knowledge across the sector both in maintained and academy through all phases. She has worked as an assessor for the DSBM, written for various sector publications and contributed to training manuals. She is currently a specialist leader in education and is registered as an associate trainer for NASBM.



Matthew Clements-Wheeler

Business Manager and Deputy Head, Bordesley Green Girls' School

Matthew is a Fellow and trustee of the National Association of School Business Management and led the creation of the new standards for SBMs. Matthew has delivered training for SBMs and headteachers across the UK and internationally.

[@MidlandsSBM](#)



Russell Dalton

Finance and Business Director, Pershore High School

Russell is finance and business director at Pershore High School in Worcestershire and a NASBM fellow. Previously he had a successful military career, and now enjoys using the lessons learned in leadership, teamwork and professionalism to motivate others in the workplace.



Julia Harnden

ASCL Funding Specialist

Julia is the ASCL Funding Specialist and works as part of the ASCL policy directorate. Currently Julia is working with schools to support financial sustainability and strategic financial planning and represents ASCL in the campaign for a national funding formula.

[@julia_harnden](#)



Nickii Messer

School Business Manager and Leadership Development

Nickii Messer was a school business manager for many years in three school phases, including seven years on the SLT. She now works as a consultant and, in recognition of her strategic leadership experience, is Anglia Ruskin's operational lead for their SBM programmes.

[@NickiiMesser](#)



Heather Mitchell

Associate, Browne Jacobson LLP

Heather specialises in contentious and non-contentious employment matters, including contractual issues, unfair dismissal, redundancy and all areas of discrimination.



Justin Smith

Owner, Chameleon Training and Consultancy

Following a career spent in private sector business development and marketing, Justin moved into the education sector over 15 years ago. Justin is a vastly experienced bid writer with a strong track record in raising funds for schools via conventional trust funds, grants and sponsorships. To date Justin has raised over £1 million in additional income for schools.

[@jus_chameleon](#)

09:00 – 09:45 Registration and refreshments

09:45 – 10:00 **Chair's Introduction & Welcome**

10:00 – 10:30 **Funding Update** **Education Funding in 2018/19:** Manage uncertainty surrounding the new National Funding Formula and gain clarity on increases to pensions and National Insurance to effectively prepare for the impact on your organisation
Julia Harnden, ASCL Funding Specialist

10:30 – 11:00 **Staffing costs** **How to carry out a compliant restructure:**

- Understand key timelines and notice periods for leadership, teaching and non-teaching staff restructures
- Know legally when and how to harmonise t&cs and make changes to TLR systems
- Learn how to avoid tribunals and unfair dismissal claims

Heather Mitchell, Associate, Browne Jacobson LLP

11:00 – 11:20 Question and answers using interactive tool Slido

11:20 – 11:50 Morning refreshments

11:50 – 12:50 **Practical and interactive workshops 1**

1A: RESTRUCTURES

Learn how to carry out a financial audit of your staffing structure, assess relevant ratios and ensure affordability when carrying out a restructure
Micon Metcalfe, Director of Finance and Business, Dunraven School

1B: PREMISES MANAGEMENT

Guidance on developing a robust and strategic long-term premises maintenance plan and how to capitalise on corporate social responsibility to raise funds to upkeep your buildings and grounds
Plus, leave with an additional resource on the mandatory checks you must carry out each year
Russell Dalton, Finance and Business Director, Pershore High School

1C: CENTRALISATION OF SERVICES

Best practice when centralising services within your MAT to achieve economies of scale and how to calculate your 'top slice' to ensure transparency and cost effectiveness
Karen Sayers, Chief Operating Officer, Partnership Learning

12:50 – 13:50 Lunch, exhibition & networking

13:50 – 14:50 **Practical and interactive workshops 2**

2A: FORECASTING & BUDGETING

Presenting the certainty of uncertainty: Build up effective scenarios and realistic 3-5 year budgets to ensure accurate short- and long-term forecasting
Sue Birchall, Business Manager, The Malling School

2B: RECRUITMENT

Learn how to market and promote your school effectively to attract the highest-quality staff and help reduce expensive recruitment costs
Share your own experiences and learn from others during this interactive session
Justin Smith, Owner, Chameleon Training and Consultancy

2C: STAFF WELLBEING

Gain hands-on techniques to take care of your own wellbeing and leave with easy-to-implement strategies to help support all staff
Try some of the techniques out in this practical session
Jody Walshe, Educational and Child Psychologist

14:50 – 15:10 Afternoon refreshments

15:10 – 16:10 **Practical and interactive workshops 3**

3A: BID WRITING EXPERTISE

Generating income through quality grant applications: Know where to look, gain key pointers on successful bid writing and top tips on securing approval
Work through practical examples of how to write persuasive and successful bids

3B: COLLABORATION

What does true school-to-school collaboration look like and how can we overcome competition to achieve effective procurement and value for money?
Share your own experiences and learn from others during this interactive and discussion-led session
Emma Gray, Business Manager, Marling School

3C: EXPERIENCED SBM/CFO ROUNDTABLE

Benchmark your school with others by sharing and comparing your own financial data and discuss how to make changes for the better and help your school survive during challenging times
Share and learn with your peers during this dedicated CPD session for experienced SBMs
Matthew Clements-Wheeler, Business Manager and Deputy Head, Bordesley Green Girls' School

16:10 – 16:40 **Working smarter** **How to work smarter not harder:** Apply business principles and models across your practice and use these to inform your strategic business improvement plan
Nickii Messer, School Business Manager and Leadership Development

16:40 Conference close

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One Day National Conference - 6th December 2017, London

How to register

1. Book online and receive instant confirmation
oego.co/Finance17
2. Email: sarah.marshall@optimus-education.com
3. Questions: Call Sarah on 020 3325 0375

Please see

www.oego.co/TandCs for our subscriptions, cancellations and refund policy

Pricing

| Prices | Book before 20/10/17 | Book after 20/10/17 |
|---------------|---|---------------------|
| | £150 | £180 |
| Unlimited CPD | Included in your Unlimited CPD membership fee | |

Booking reference

CPDB

1

Before
the day

Create your account at oego.co/Delegate and gain access to pre-event reading and resources

PLUS

- Use the self-assessment survey to reflect on your current situation
- Read the article on minimising risk during redundancies
- Access the 7 steps checklist for effective budget review

2

During
the day

Gain a vital opportunity to discuss challenges with peers and build up a network of support and contacts

PLUS

- Select targeted workshops to suit your specific needs
- Ask your key questions to experts and speakers on the day

3

After
the day

Log in at oego.co/finance17 to access the guide for carrying out an affordability audit of your staffing structure

PLUS

- Use the self-assessment survey to identify new strengths and action points
- Use our top tips and key pointers for successful bid writing

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Share
across your school

Become an Optimus Unlimited CPD member and gain resources to aid your external CPD delivery*

INCLUDING

- Download and deliver the finance strategy for budget holders training course

Start accessing these resources today by creating a free delegate account on oego.co/Delegate

Remember, Optimus Unlimited members can attend and access resources for 35+ conferences a year! Get in touch to learn more.

*Access to download and deliver training modules for Unlimited members only – get in touch to find out more about the benefits of becoming an Optimus Unlimited member