

# 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](https://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

# Effective financial management in uncertain times

One Day National Conference - 6th December 2017, London

## How to register

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

Please see

[www.oego.co/TandCs](http://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](http://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](http://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

4

**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](http://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