

	1. health check	2. investigate and prevent	3. plan and implement change	4. ICFP tool and support
Who it's for	Schools and trusts with no significant financial issues.	Schools and trusts that are forecast to be in financial difficulty or have future cost pressures.	Schools and trusts that are expanding, restructuring or making other significant changes, or new schools or trusts that are about to open.	Schools and trusts who want to implement - or review their use of - integrated curriculum and financial planning
What you get	<p>Around 2 days of consultancy to:</p> <ul style="list-style-type: none"> • review your financial management systems and skills • identify strengths, weaknesses and ways to improve • identify training needs for staff 	<p>Around 3 to 5 days to:</p> <ul style="list-style-type: none"> • identify and address specific issues or future budget pressures • identify ways to increase efficiency, financial capability and pupil performance 	<p>Around 6 to 10 days to:</p> <ul style="list-style-type: none"> • plan and implement fundamental changes in financial planning and resource management • identify ways to increase efficiency, financial capability, pupil performance and capacity 	<p>Around 3 to 5 days - work with the supplier to:</p> <ul style="list-style-type: none"> • populate an ICFP Modelling Tool or app to which the supplier will provide access • use key data to identify ways to invest the maximum school resources in the classroom • model or review plans for future years to ensure that the school's curriculum framework is sustainable • introduce or review systems and approaches to using workforce metrics, by working with both education and financial staff
What's involved	<p>Your financial adviser will:</p> <ul style="list-style-type: none"> • assess your current and 3 to 5 year budget position • review your key workforce metrics including average class size, pupil-teacher ratio, teacher contact ratio and average teacher cost • review your approach and processes for integrated curriculum and financial planning including the skills of your leadership team and governing body 	<p>Your financial adviser will:</p> <ul style="list-style-type: none"> • help your 3 to 5 year budget planning and forecasting (including the use of workforce metrics) • review your workforce metrics to identify opportunities to improve your staffing structure • review your approach and processes for integrated curriculum and financial planning including the skills of your leadership team and governing body 	<p>Your financial adviser will:</p> <ul style="list-style-type: none"> • help your 3 to 5 year budget planning and forecasting (including the use of workforce metrics) and help you implement it • review workforce metrics against benchmarks and help you identify and implement improvements to your staffing structure • review your approach and processes for integrated curriculum and financial planning including the skills of your leadership team and governing body 	<p>Your ICFP adviser could support you to populate an ICFP modelling tool provided by the supplier in order to:</p> <ul style="list-style-type: none"> • review current curriculum provision and identify opportunities for developing longer-term, affordable models • review your approach and processes for integrated curriculum and financial planning including the skills of your leadership team, school business professional and governing body

	<ul style="list-style-type: none"> • align your financial strategy, curriculum and workforce planning 	<ul style="list-style-type: none"> • review your financial structures, capability and capacity, such as budget management, financial strategy, reporting and governance, and capacity building 	<ul style="list-style-type: none"> • review your schemes of delegation and systems of internal control to ensure you comply with the academies financial handbook (AFH) or local authority financial control procedures 	
	<ul style="list-style-type: none"> • conduct a financial skills audit of your leadership team and governing body 		<ul style="list-style-type: none"> • conduct a financial skills audit of your leadership team and governing body 	<ul style="list-style-type: none"> • discuss with your senior leadership team about implementing a new or improved approach to ICFP
	<ul style="list-style-type: none"> • review your financial systems including forecasting, reporting, compliance and governance 		<ul style="list-style-type: none"> • review your financial systems including forecasting and reporting 	<ul style="list-style-type: none"> • work with you to model future scenarios based on your pupil numbers and curriculum structure
	<ul style="list-style-type: none"> • compare your staffing structures and spending against other schools 	<ul style="list-style-type: none"> • assess how different staffing structures could affect your long-term budget 		<ul style="list-style-type: none"> • analyse your current staffing deployment model and workforce metrics to identify opportunities to deploy teachers, high-level teaching assistants and other support staff to get the best pupil outcomes
	<ul style="list-style-type: none"> • assess your use of revenue and capital funding 			
	<ul style="list-style-type: none"> • develop your business vision, financial strategy and KPIs 			
		<ul style="list-style-type: none"> • identify and address specific financial issues, such as deficit, pupil numbers, procurement, income generation and restructuring 		
		<ul style="list-style-type: none"> • help you develop an action plan to address the issues they've identified 		
			<ul style="list-style-type: none"> • review your financial governance including a skills audit of your governing body and leadership team and an assessment of your committee structures 	

			<ul style="list-style-type: none"> • review your internal policies, for example recruitment, safeguarding and whistleblowing, to ensure compliance with the AFH and the funding agreement 	
			<ul style="list-style-type: none"> • advise you on HR, legal and stakeholder management to support staff development, performance management and restructuring 	
			<ul style="list-style-type: none"> • help your trustees to develop the skills and tools to agree and implement an action plan 	
	For MATs, your financial adviser will also:	For MATs, your financial adviser will also:	For MATs, your financial adviser will also:	For MATs, your adviser could also help you:
	<ul style="list-style-type: none"> • benchmark central trust expenditure • review and evaluate your due diligence assessment 			
	<ul style="list-style-type: none"> • assess the efficiency of your central office functions 			<ul style="list-style-type: none"> • help you to develop or implement a consistent and effective approach to ICFP process
		<ul style="list-style-type: none"> • review the workforce benchmarks across all schools in the trust 	<ul style="list-style-type: none"> • review the workforce benchmarks for across all schools in the trust 	<ul style="list-style-type: none"> • review the workforce metrics for all schools in your trust
			<ul style="list-style-type: none"> • evaluate your growth trajectory 	<ul style="list-style-type: none"> • model future scenarios for your trust as a whole