

	1. health check	2. investigate and prevent	3. plan and implement change
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.
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
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 align your financial strategy, curriculum and workforce planning compare your staffing structures and spending against other schools conduct a financial skills audit of your leadership team and governing body review your financial systems including forecasting, reporting, compliance and governance assess your use of revenue and capital funding develop your business vision, financial strategy and KPIs <p>For MATs, your financial adviser will also:</p> <ul style="list-style-type: none"> benchmark central trust expenditure review and evaluate your due diligence assessment assess the efficiency of your central office functions 	<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 ways 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 review your financial structures, capability and capacity - such as budget management, financial strategy, reporting and governance, and capacity building assess how different staffing structures could affect your long-term budget identify and address specific financial issues - such as deficit, pupil numbers, procurement, income generation and restructuring help you develop an action plan to address the issues they've identified <p>For MATs, your financial adviser will also:</p> <ul style="list-style-type: none"> review the workforce benchmarks across all schools in the trust 	<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 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 conduct a financial skills audit of your leadership team and governing body review your financial systems including forecasting and reporting review your financial governance including a skills audit of your governing body and leadership team and an assessment of your committee structures review your internal policies - such as recruitment, safeguarding and whistleblowing - to ensure compliance with the AFH and the funding agreement advise you on HR, legal and stakeholder management to support staff development, performance management and restructuring help your trustees to develop the skills and tools to agree and implement an action plan <p>For MATs, your financial adviser will also:</p> <ul style="list-style-type: none"> review the workforce benchmarks for across all schools in the trust evaluate your growth trajectory