

## **Integrated Curriculum Financial Planning (ICFP) – Introduction and Implementation Conference**

For Business Managers and Headteachers

The need for school leaders to focus on financial efficiency and sustainability has never been more important. The DfE has begun to strengthen its emphasis on the links between ICFP, effective resource management and efficient financial management through:

### **Schools Financial Value Standard (SFVS) – Question 7**

Is the financial strategy integrated with the school's strategy for raising standards and attainment, through curriculum-led financial planning?

### **Key note speaker: Andrew S Hamilton**

A highly experienced school head teacher and MAT CEO, NLE, ISBL Fellow and qualified School Resource Management Adviser (SMRA). Andrew has been at the forefront of ICFP and has used his extensive knowledge and experience both as a consultant and practitioner to positively transform school resource management across the education system.

### **Agenda**

| <b>Morning 9:00am – 12:30pm</b>  | <b>Afternoon 1:15pm – 4:00pm</b>   |
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| <ul style="list-style-type: none"><li>• What is ICFP and why do we need it?</li><li>• The importance of ICFP and its impact</li><li>• Making ICFP accessible and simple to use</li><li>• Introduction to ICFP approaches</li><li>• A straightforward model to use</li><li>• Introduction to ICFP metrics and tools</li><li>• Overview of data used to calculate the metrics</li><li>• Applying ICFP to different school types &amp; contexts</li></ul> | <ul style="list-style-type: none"><li>• How to correctly generate the data required</li><li>• How to calculate the metrics</li><li>• Know how to begin to diagnose any potential areas of concern in your school</li><li>• Understand what RAG rated metrics are showing</li><li>• How to integrate ICFP into the wider budget and improve school strategic planning</li><li>• Using a simple tool to enhance your ICFP analysis</li><li>• Conversation starters, next steps</li></ul> |

**Wednesday 1 April 2020**

**Shaftsbury Park, Frenchay Park Road, BS16 1LG**

**9:00am – 4:00pm (8:45am arrival)**

**Cost per delegate £50 (to include lunch)**

To make a booking use our CPD Online Booking System at [www.sgsts.org.uk/training](http://www.sgsts.org.uk/training)  
Conference reference number: **CONF/20/153**

## What is ICFP?

Integrated curriculum financial planning (ICFP) is a management process that helps schools plan the best curriculum for their pupils with the funding they have available. It can be used at any phase or type of school.

ICFP uses a set of metrics that provide the analytical evidence that will inform medium-term strategic planning as well as short-term operational management action planning and collaborative decision-making of school business professionals, senior leaders and governors.

The more metrics you measure, the more accurately you'll be able to plan. The metrics are easily analysed and provide the conversation starters required in leadership discussions around how efficiently resources are being used, how this can be improved and what actions need to be taken. ICFP should be a normal part of your planning cycle and involve your senior leadership teams, including your business manager and governors.

There is no prescribed way of implementing ICFP. This conference will focus on 12 Key Metrics. These metrics were initially developed by Andrew Hamilton who more recently partnered with the Institute of School Business Leadership (ISBL) to develop the unique ICFP tool, I-SOT.

## The benefits of ICFP

Linking curriculum and financial planning can help you:

- Achieve educational success and financial sustainability
- Deliver the best curriculum your school can afford that meets the needs of your pupils
- Quantify and diagnose areas of inefficiency
- Make informed decisions to achieve effective resource management
- Maximise the curriculum efficiency of your school
- Manage unexpected costs, challenges or opportunities
- Assess risks

"Andrew Hamilton, an experienced SRMA, was really thought provoking and clearly has a very deep knowledge of this subject. It was really interesting to see how the simple set of metrics can be used to inform our strategic financial decision making by allowing us to analyse and plan how best to use the resources we have available to us. I am keen to learn more about using these tools to help my school unpick inefficiencies and highlight areas of concern which we may previously not have seen or understood, thereby allowing us to investigate further. I believe ICFP will be of great interest to School Business Professionals and Headteachers and would encourage anyone who doesn't currently use this approach to explore further."

**Debbie Beazer**  
School Business Leader  
Blackhorse Primary School

"I recently attended the free ISBL ICFP training which was presented by Andrew Hamilton. His vast knowledge of this subject was presented clearly and Andrew gave examples of areas we can investigate to improve the efficiency of the school finances and resources" by utilising the ICFP metrics tool.

I look forward to working with the Headteacher and School Governors on the ICFP in the near future."

**Gerry - School Business Manager**  
Christ Church Primary School

"Andrew's workshop is insightful and gave me a much better understanding of how I can use the ISBL ICFP matrix tool to identify key areas for our strategic financial management plan and how I can gather the evidence I need to be able to link this to school improvement."

**Denise Hickson**  
School Business Manager  
Wheatfield Primary School