

Operating Efficiently

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Managing Director, SBM Services Ltd

It's challenging right now



FINANCE

Cost of living crisis

Reduced pupil numbers due to drop in birth rate

Increase in pupils with SEND



FACILITIES

Buildings are not fit for purpose

RAAC

DfE pressure to manage facilities more strategically



HR

Recruitment and retention issues

Wellbeing/ reducing teacher workload

It's challenging right now



IT

Failing hardware

DfE digital and technology standards in schools to be met

Cyber Security



GENERAL OPERATIONS

Keeping abreast of changes

Numerous policies to maintain and implement

Lack of staff capacity to do everything required

Business Owner Pressures

The top 5 Biggest Pressure Points in 2023 according to British business owners:

Business Owners

- 1 Generating new business
- 2 Rising operational costs
- 3 Balancing work and personal life
- 4 Hiring and retaining skilled employees
- 5 Keeping up with technological advancements and digital trends

Schools

- Maximising pupil numbers
- Increases to salaries, fuel, supply and services
- Less capacity due to funding issues, more compliance required, teachers' workload
- Restricted flexibility with salaries, Lack flexible working opportunities, shortage of teachers
- Pupils are more tech savvy, schools not able to stay at the cutting edge of IT, AI advancements

ISBL Funding Survey

- Lack of high needs funding perceived as the highest risk to school budgets. **88%** of respondents said that SEND was only partially funded in their school.
- **3/4** of schools said that the additional grants paid in recent years to support with rising costs only partially closed the funding gap
- **2/3rds** of schools say they expect to have less than the suggested 5% of total income as reserves at the end of 2023-24
- Fewer than **2%** have more than the suggested 20% of income maximum
- **1 in 5** schools say they will run out of cash this current financial year
- More than **1 in 10** schools will run out of cash in 2024-25
- A staggering **1 in 2** schools have indicated they will run out of cash in 2025-26

These predictions would leave fewer than 1 in 5 schools operating in 2026-27

The storm will pass



**You can't calm the storm,
so stop trying.**

**What you can do is calm
yourself.**

The storm will pass.

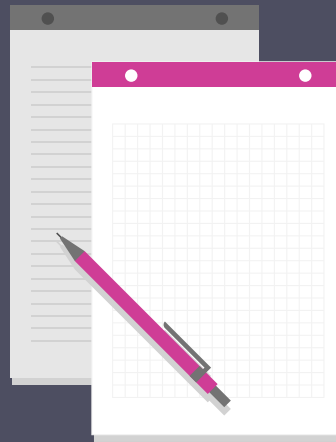
Examples of lack of efficiency



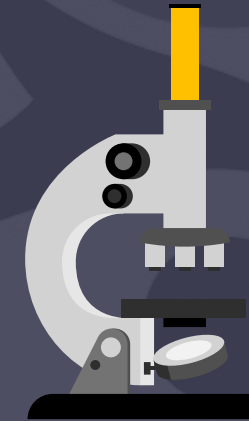
Poor communication



Slower to embrace technological advancements



Outdated processes



Lack of monitoring and accountability outside of curriculum areas

AI – what can it do for you?

Original

Dear Parents/Carers,

Welcome back to Summer Term 1. What a week we have had weather wise, with all seasons happening at once on some days! The children have all come back rested and ready for learning.

The highlight of this week was for Years 3 and 4 and their trip to Suffolk Farm Fair. I'm not sure who was most tired at the end of the day, the children or the adults.

A reminder that clubs, including choir, start next week.

Have a lovely weekend!

Head of School

After AI intervention

Dear Parents and Carers,

As we step into Summer Term 1, we've experienced a whirlwind of weather—sometimes all four seasons in a single day! Our students have returned, rejuvenated and eager to learn.

This week's highlight was the delightful outing for Years 3 and 4 at the Suffolk Farm Fair. It's hard to say who was more exhausted by day's end—the children or the adults!

A friendly reminder that clubs, including choir, kick off next week.

Wishing you all a wonderful weekend!

Warm regards,

Head of School

AI - what can it do for you?

Example School Financial Management Report

March 2024 (Period 7)

AI Assistant

Unlock full access to Acrobat AI Assistant

Subscribe now

→ Provide a list of the 5 most important points

→ What is the premises costs per pupil for 2021-22?

→ What is the forecasted movement in total operational reserves for 2020-21?

Ask a question about this document



AI-generated responses may be inaccurate or misleading. Be sure to double-check responses and sources. [Learn more](#)

Provide a list of the 5 most important points

- The actual income for March 2024 is £1,709,124, with a positive variance of £133,816 compared to the budgeted income. ¹
- The ESFA and LA Funding category has the highest income, followed by the Other Income category. ²
- The document contains tables that provide information on the Year to Date (YTD) actual, budget, and variance for various expenditure categories. ³
- The total expenditure for the period is £158,155, with the highest expenditure occurring in period 3 and the lowest in period 2. ⁴
- Total Income/Number of Pupils has increased over the years, while Government Funding as a % of Total Income has decreased. ⁵

Create a short abstract of this document for my website

The document provides a comprehensive overview of the financial performance of an organization, highlighting key income and expenditure figures. ¹ It includes tables that detail the actual income and budgeted income for March 2024, as well as

Create a Slack message with the key takeaway from this document

The key takeaway from the financial document is that the actual income for March 2024 exceeded the budgeted income, with the highest income coming from the ESFA and LA Funding category. ¹ This is great news and shows positive financial

DfE Focus on Financial Efficiency

DfE placing a big emphasis on ensuring schools are monitoring and reporting on their financial health.

<https://www.gov.uk/government/collections/schools-financial-health-and-efficiency>

Appointment of SRMAs

DfE Find a Framework

Workload Toolkit

Efficiency Metric Tool

Schools Resource
Management Self
Assessment Checklist

Benchmarking Data

Governor Resource
Management Checklist

Integrated Curriculum
Financial Planning

Finance Staff Mentoring
Scheme

Free Contract
Management Training

Bursaries to help fund
finance training

SRM Webinars

Culture of Efficiency

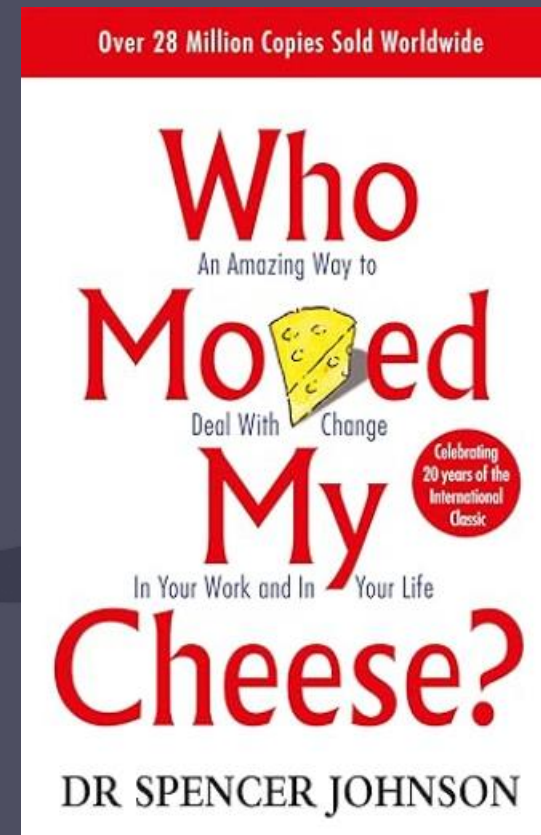
- The people responsible for financial and business management have to be a core part of the senior leadership team.
- Comprehensive and accurate financial information has to be produced regularly and in a format suitable for all users.
- Resource decisions must be based on cost vs benefit
- Processes have to be strong to prevent error, irregularity, wastage and time wasting.
- **Every** part of the organisation should have targets and be monitored
- Difficult decisions sometimes have to be made
- There is a culture where everyone works collaboratively together.

Schools need to have a business operating system that tracks and measures every part of the organisation

Who Moved My Cheese?



Standing still is not an option



Traction: A Business Operating System

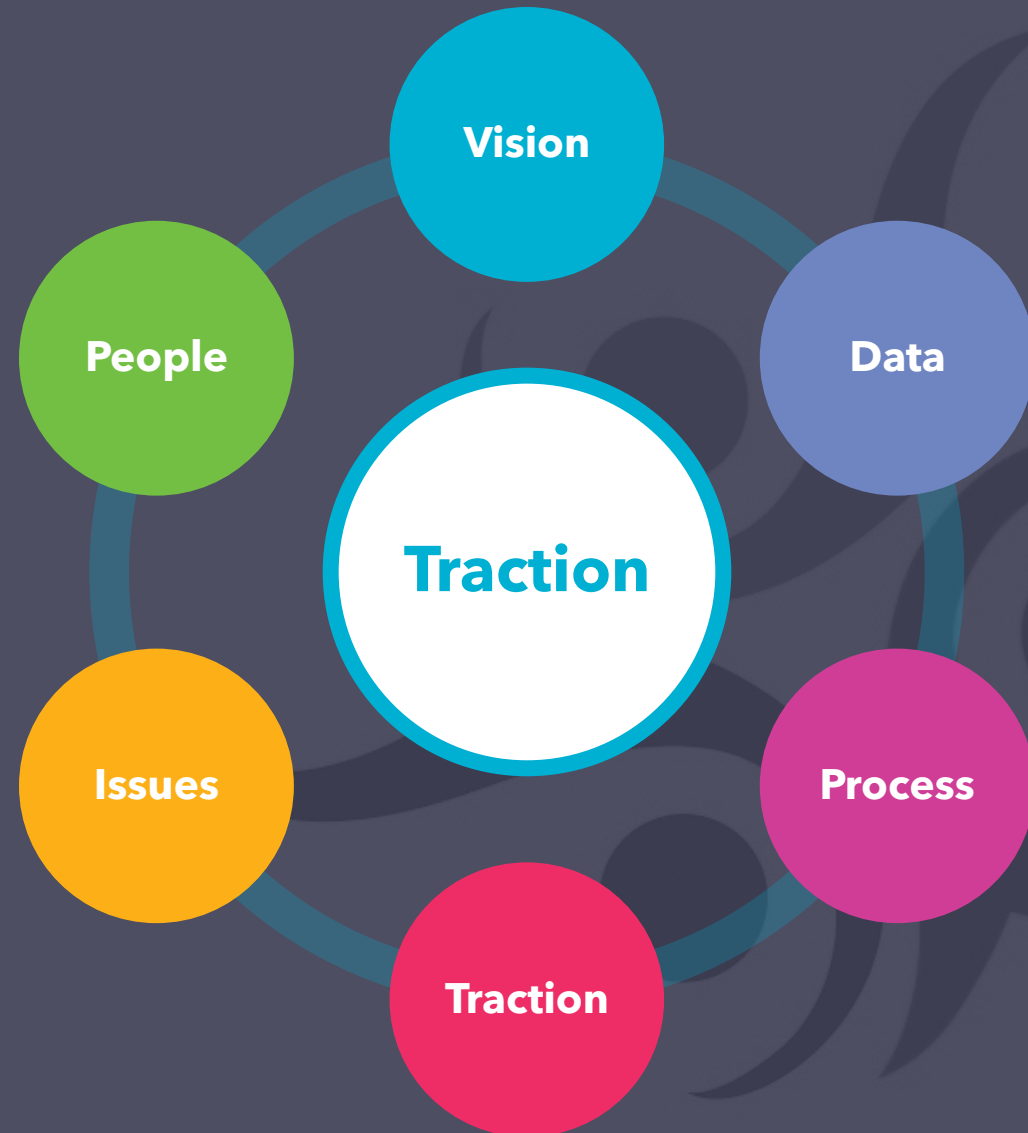
Successful organisations operate with a crystal clear **vision** that is shared by everyone.

They have **the right people** in the right seats.

They have a **pulse** on their operations by watching and managing a handful of numbers on a regular basis.

They identify and **solve issues** promptly in an open and honest environment.

They establish **priorities** for each employee and ensure that a high level of trust, communication and accountability exists.



Planning for Success

3 Year Picture

What do we want our trust / school / department / team /my job to look like 3 years from now?

1 Year Picture

- What will success look like one year from now?
- Quantify this in terms of specific measurable goals?
- Make sure those goals lead you to achieve your 3 year aims.

Decide on between 3 and 7 goals that must be completed in the next year to be on track to complete both 1 year and 3 year goals. Must be specific, measurable and attainable



More time or more focus?

Its hard to find more time so try to find more focus.

Fewer projects. Fewer commitments. Fewer obligations. Fewer responsibilities.

Carefully choose what you commit to, then go all in.

Termly 'Rocks'

The short-term priorities that must happen in the following term above everything else you are doing.



Process:

- **List** everything that has to be accomplished next term
- **Debate** which are the most important (keep it, kill it or combine it with another priority). Narrow list down to no more than **7**
- Set **dates** the rocks are due
- **Define** each rock so the objective is clear and measurable
- Assign who **owns** the rock. Must only be one person
- Make sure all rocks are **documented** and bring to a weekly 'pulse' meeting

Pulse Meeting

Well run meetings are the moment of truth for accountability and keep organisations moving forward

Extremely productive meetings actually save time

Great meetings increase communication, team health and result

Pulse meetings can become your school's heartbeat

Agenda

Segue:	5 minutes
Data:	5 minutes
Rock Review:	5 minutes
Employee headlines:	5 minutes
Issue/Discuss/Solve:	30 to 60 minutes



Meeting Organisation

School Pulse Meeting ☆ 👤 🔊 Board ▾ 🔍 ⚡ ☰ Filters HW

Meeting Set Up

Pulse meeting timings 9.00am Segue 9.05am Scorecard 9.10am Rock Review 9.15am Employee/Customer Headlines 9.20am Actions 9.25am IDS 10.30am Meeting Close

Chair Rota

Key Performance Indicators

+ Add a card

Actions

Sarah
Write Headteacher's report for governors

Mike
Recruitment for new KS1 teacher

Helen
Approve payroll

Helen
Start procurement for new grounds maintenance supplier

Craig
Contract for new LSA

Analyse pupil data following latest teacher assessment data

+ Add a card

Completed Actions

Sarah
Finalise FGB agenda

Helen
Recruitment for LSA

Sarah
Mid term PMRs for teaching staff

Craig
Update policy tracker

Helen
Set objectives for support staff PMRs

Sarah
Staff wellbeing survey issued to staff

+ Add a card

Operational Issues

Helen
New pupil joining in Year 2

Mike
Letter to parents about Year 5 class trip to the zoo

Sarah
PE feedback survey to be shared with parents

Craig
Draft timetable for 2024/25

Helen
Chase up o/s EHCP applications

Mike

+ Add a card

Meeting Organisation

The screenshot displays a Trello workspace named 'School Board'. The interface includes a top navigation bar with 'Workspaces', 'Recent', 'Starred', and 'More' menus, a search bar, and a 'Filters' button. The board is organized into four columns:

- Staff Meeting Agenda 15th May**: A list of tasks with durations: 'Parents' Evening arrangements' (5 mins), 'Data protection update' (5 mins), 'Duty rotas' (5 mins), 'Behaviour update' (10 mins), 'Teaching & learning' (30 mins), and 'Upcoming calendar reminders' (5 mins).
- FGB Meeting 22nd May 2024**: Tasks assigned to Sarah ('Book meeting room and arrange refreshments') and Stuart ('Circulate agenda, meeting papers and previous minutes').
- Caretaking Requests**: A list of requests categorized by priority: 'High Priority' (Broken chair in Year 3 classroom), 'Medium Priority' (Leaking tap in KS1 girls' bathroom), 'Medium Priority' (Summer term H&S walkaround), 'Low Priority' (Year 6 classroom setup for FGB meeting), and 'Low Priority' (Source quotes for playground equipment).
- Operational Issues**: A list of administrative tasks: 'New pupil joining in Year 2', 'Letter to parents about Year 5 class trip to the zoo.', 'PE feedback survey to be shared with parents', 'Draft timetable for 2024/25', 'Chase up o/s EHCP applications with LA', and 'Open up bookings for parents' evening appointments'.

Issues/Risks

Our ability to succeed is in direct proportion to our ability to solve problems

- Don't put off making hard decisions
- You should reach decisions promptly and change them slowly
- Most teams spend their time discussing the heck out of everything but rarely end up solving anything
- It is less important **what** you decide than it is that you **do** decide. More is lost by indecision than by wrong decisions
- It's ok to try and fail

IDS Model for dealing with issues

Identify the issue and its root cause



Discuss the issue and potential solutions - don't let tangents get in the way



Solve - becomes an action for someone that will solve the issue. Make a solution statement so everyone is clear.

People Analyzer

**Do you have all the right people in the right seats?
Are you the right person in the right seat?**

The **right people:**

- Share the organisations core values
- They fit and thrive in your culture
- They are people you enjoy being around and who make your organisation a better place to be

The **right seat:**

- Every member of staff is operating within their area of greatest skill and passion and what is expected of them fits with their **unique ability**.



List core values/skills of the ideal people



Define your minimum standard



Evaluate your team against these ideal values and standards

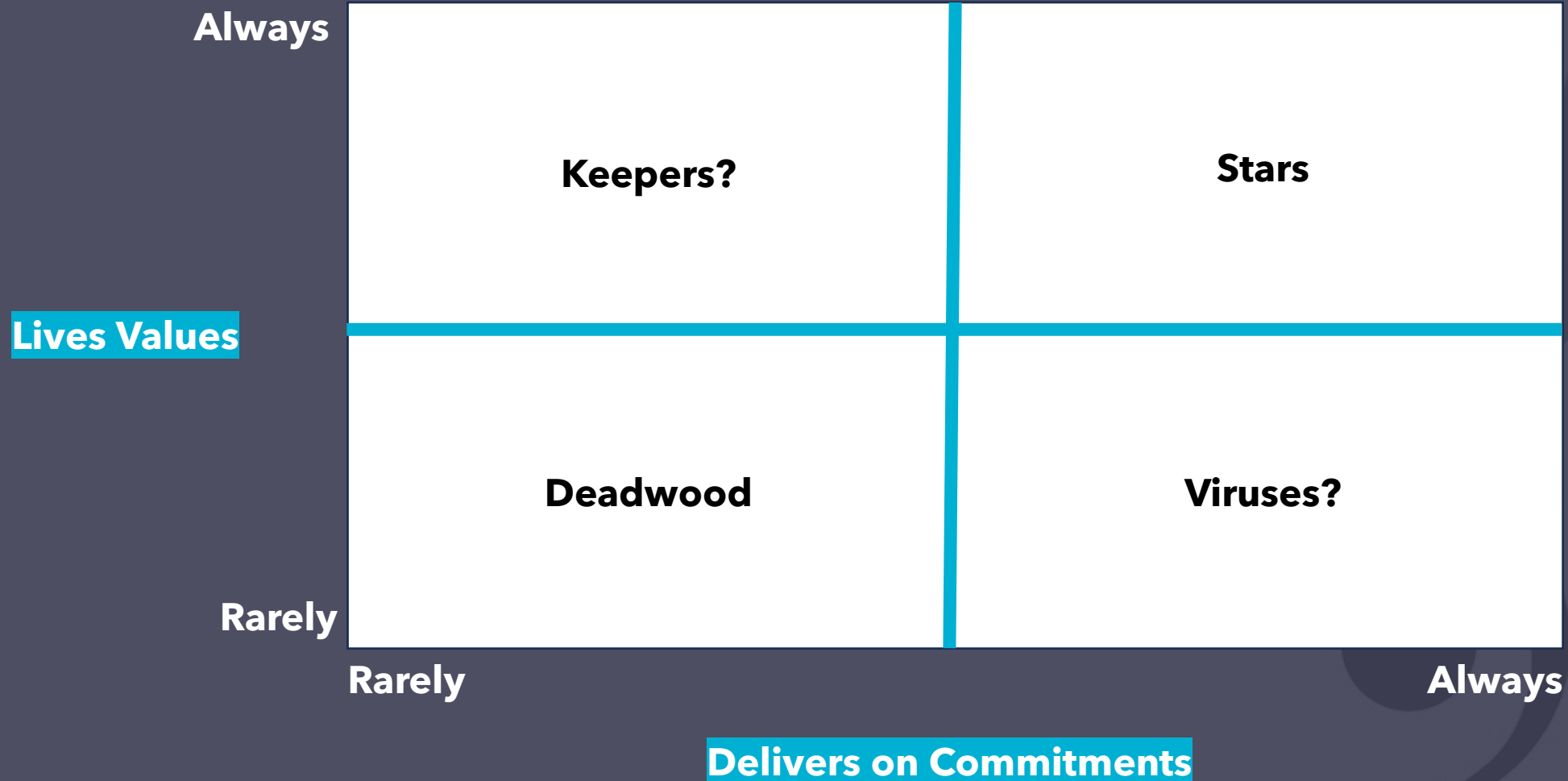
Once we know we have the right people, do we have everyone now in the right roles?

The right people

People Analyser

	Caring	Collaboration	Passionate	Excellence	Innovative	Technical
Joe	+	-	+	+	+	-
Evie	+	+	+	+	+	+
Michael	-	-	-	-	-	+
Justin	+	+	-	+	-	+
Stevie	+	+	+	+	-	+
Sabrina	+	+	+	+	+	-

People Analyzer



Everyone has a number

Receptionist

School phone is answered within **3** rings

Payroll Manager

Payroll to be processed by the 10th of the month



Finance Manager

Management accounts are shared with the SLT and trustees/governors within **14** days of month end


Site Manager

Priority jobs are completed within **1** working day

Meeting Steven Bartlett!



Steven Bartlett - Words of Wisdom




Focus on the details and sweat the small stuff

Spend way more time on recruitment than you are currently

Growth happens when you start doing things you are not qualified to do

It's better to experiment and fail than not to experiment at all



Failure is feedback, feedback is knowledge and knowledge is power

Building a whole wall can seem daunting but it all just starts from laying one perfectly laid brick

Invest in you

Fill your 5 buckets in the right order



Knowledge

What you know



Skills

What you can do



Network

Who you know



Resources

What you have

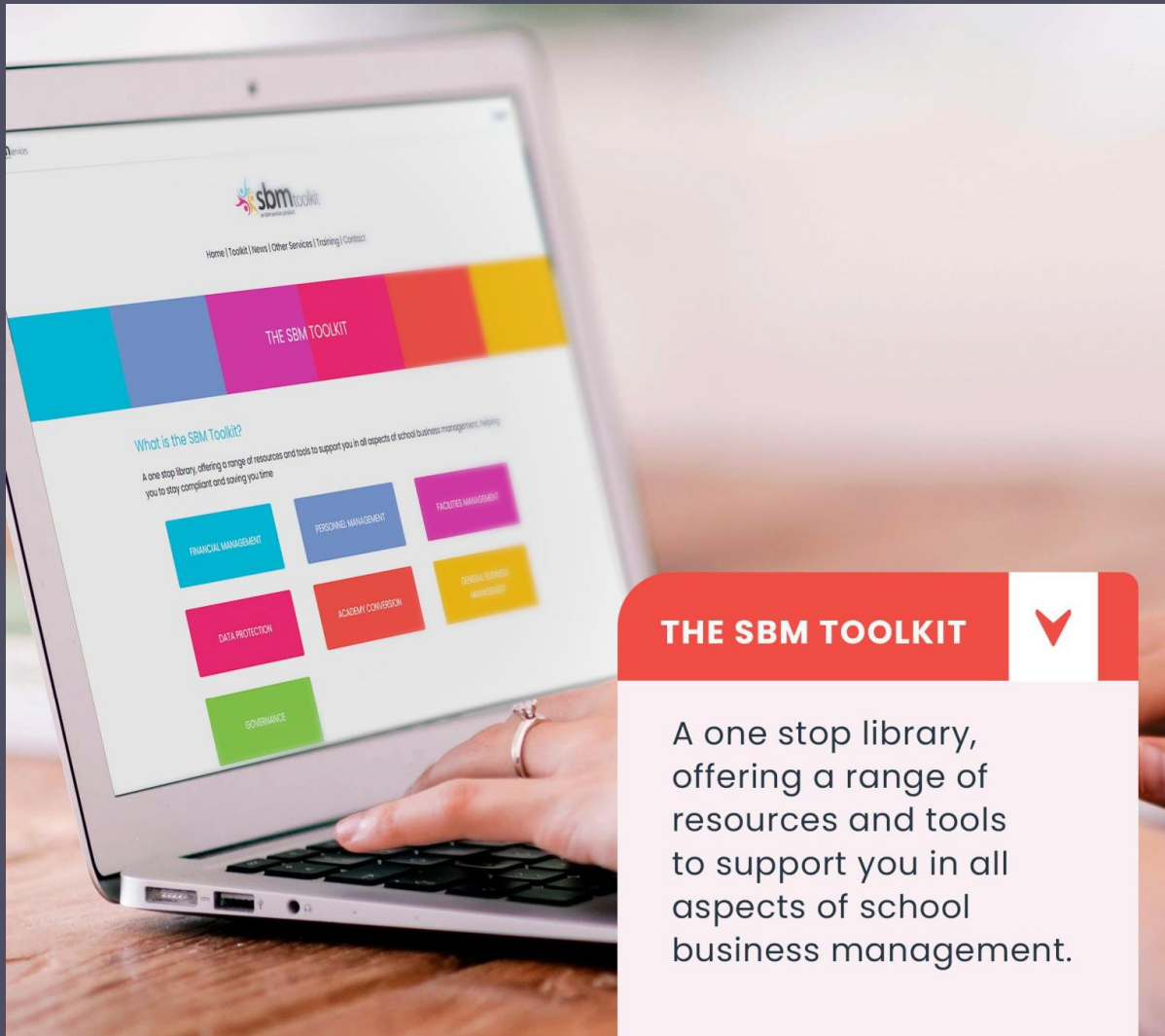


Reputation

What people think of you

Training, CPD and networking is not a luxury, its essential for success

The SBM Toolkit - Helping you to be more efficient



An invaluable companion for school business managers!

The SBM Toolkit is your go to place for support with school business management - helpful checklists, templates, policies, resources and tools all designed to support you in your role and to help save you time

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