

**Free In-Person
Training**

STRATEGIC FINANCIAL LEADERSHIP PROGRAMME

A FREE DfE-funded four-stage progressive programme of workshops, designed to build financial confidence, expertise, capacity and sustainability specifically for Headteachers and School Business Managers, Governors & Leaders.

15th October 2026

26th November 2026

28th January 2027

18th March 2027



Delivered by: **Rebecca Beaver**
ISBL CEO award for Exceptional Contribution to School
Business Leadership (2023)
DfE School Resource Management Adviser (SRMA)
Education Consultant
Fellow of the Institute of School Business Leadership (FISBL)



Supported by: **Claire Keefe**
Executive School Business Leader, Barking Abbey &
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DfE School Resource Management Adviser (SRMA)
Fellow of the Institute of School Business Leadership (FISBL)

A Department for Education (DfE) programme delivered in collaboration with BDSIP

Every Pound Matters. Every Decision Counts.

The role of school leaders has never been more complex. Alongside delivering exceptional educational outcomes, leaders are navigating increasing financial pressures, rising employment costs, growing SEND demand and heightened expectations around governance, accountability and value for money. Every strategic decision, whether about staffing, curriculum, estates, procurement or operational services has a direct impact on both educational outcomes and long-term financial sustainability.

Financial sustainability is not only about balancing the budget; it is about ensuring every resource is deployed to maximise impact for children and young people.

With staffing representing a schools largest area of expenditure, small improvements in workforce deployment, curriculum planning and operational efficiency can deliver significant financial efficiencies, create organisational capacity and strengthen long-term sustainability.

Schools face increasing financial pressure while being expected to demonstrate value for money, strong governance and improved outcomes, making strategic financial leadership and effective resource management more important than ever.

THE FINANCIAL CHALLENGE FACING LBBD SCHOOLS

THE LOCAL CONTEXT (2024–25)

68%

of schools spent
more than their
annual income
(in-year deficit)

34%

of schools held
negative revenue
reserves

£5M+

high needs
funding pressure
across the
borough

70–80%

of school income is
typically invested
in staffing

Leading Financially Sustainable Schools

The **Strategic Financial Leadership Programme** led by the DfE has been compiled to equip Headteachers, School Business Leaders and Governors with the confidence, knowledge and practical skills to lead financially sustainable schools.

Across four practical interactive workshops, delegates will explore nationally recognised approaches, learn practical strategies and discuss real-life case studies, gaining practical tools that can be implemented immediately within their own schools.

Delegates will gain the confidence, knowledge and practical tools to:

- Apply ICFP confidently within your own school for long term sustainability
- Make evidence-informed strategic decisions.
- Improve financial efficiency and organisational resilience.
- Strengthen curriculum and workforce planning using ICFP.
- Apply Operational Excellence principles to create capacity.
- Lead evidence-informed financial decisions and effective financial discussions with governors, trustees and staff
- Ensure every resource contributes to better outcomes for children and young people.

Whether your role focuses on educational leadership, business management, finance or governance, the programme develops the strategic thinking and expertise needed to improve financial efficiency, strengthen

organisational resilience, enhance strategic decision-making and ensure every resource is deployed to maximise value and deliver the greatest possible impact for children and young people.

Programme Highlights

- FREE, funded by the Department for Education.
- Nationally recognised approaches delivered within a local context with local knowledge.
- Aligned to the ISBL Professional Standards.
- Interactive workshops using real school scenarios.
- Practical templates, tools and resources to use immediately.
- Suitable for maintained schools, academies and trusts.
- Build valuable professional networks.

FLEXIBLE ATTENDANCE

Morning Session

10:00am – 12:30pm

or

Afternoon Session

1:30pm – 4:00pm

NETWORKING LUNCH

All delegates attending either session are invited to join us for a complimentary networking lunch between **12:30pm and 1:30pm.**

WHERE:

**Eastbrook School, Secondary Building,
Dagenham Road, RM10 7UR**

Parking available.



[\[click for map\]](#)

Understanding & Utilising Integrated Curriculum & Financial Planning (ICFP)

15th October 2026

BUILDING STRATEGIC FINANCIAL CONFIDENCE

Integrated Curriculum and Financial Planning (ICFP) is one of the Department for Education's most effective tools for aligning curriculum, staffing and financial planning. More than simply a financial exercise, ICFP provides school leaders with a structured, evidence-based approach to making informed strategic decisions that improve educational outcomes whilst strengthening long-term financial sustainability.

This interactive workshop introduces the principles of ICFP and demonstrates how it can

become an integral part of your school's annual leadership cycle. Delegates will learn how to complete and interpret ICFP confidently, using workforce, curriculum and financial data to support school improvement planning, staffing decisions and budget development. The session will also explore how benchmarking and contextual analysis can identify opportunities to improve efficiency, optimise resource deployment and maximise the impact of every pound invested.

“Integrated Curriculum and Financial Planning is not simply about understanding the numbers – it is about using evidence and information to make better strategic decisions that maximise resources and improve outcomes for children and young people.”

You'll learn how to:

- Understand the principles and purpose of Integrated Curriculum and Financial Planning (ICFP).
- Confidently complete and interpret the ICFP process for your own school.
- Understand key ICFP metrics and what they tell you about organisational performance.
- Use benchmarking and contextual data to identify opportunities for improvement.
- Analyse workforce deployment, curriculum efficiency and resource utilisation.
- Embed ICFP into school improvement, curriculum, staffing and budget planning.
- Use evidence to inform strategic discussions and strengthen financial sustainability.

Practical takeaways

- ✓ ICFP implementation and interpretation guide
- ✓ Annual ICFP leadership planning framework
- ✓ Benchmarking and data analysis toolkit
- ✓ Workforce deployment and resource planning templates
- ✓ Annual ICFP leadership planning framework

By the end of the session you will be able to:

- Complete an ICFP review with confidence.
- Interpret key financial metrics and benchmarking data.
- Make confident, evidence-informed decisions. Use curriculum, people and financial data to support strategic decision-making.
- Embed ICFP into your annual leadership cycle.
- Identify opportunities to improve resource deployment and financial sustainability.
- Lead evidence-informed discussions with staff, senior leaders and governors.

Leading Integrated Curriculum & Financial Planning (ICFP) Together

26 November 2026

STRENGTHENING STRATEGIC LEADERSHIP THROUGH COLLABORATIVE DECISION MAKING

Effective financial leadership is a shared responsibility. Building on Session One, this interactive workshop demonstrates how Headteachers, School Business Leaders and Governors can use Integrated Curriculum and Financial Planning (ICFP) together to strengthen strategic decision-making, improve organisational performance and support long-term financial sustainability.

Using practical case studies and real leadership scenarios, delegates will explore how curriculum, staffing and financial decisions are interconnected. The session develops the confidence to interpret ICFP collaboratively, challenge assumptions, evaluate options and use evidence to inform strategic discussions. Delegates will also learn how to embed ICFP into their annual leadership cycle to support school improvement, curriculum planning, staffing, budgeting and governance.

“ICFP is most powerful when it becomes a shared leadership discipline, bringing together curriculum, people and finance to support better strategic decisions and stronger educational outcomes.”

You'll learn how to:

- Lead strategic financial discussions using ICFP.
- Strengthen collaboration between Headteachers, School Business Leaders and Governors.
- Interpret financial and workforce data to support evidence-informed decisions.
- Understand the financial impact of curriculum, staffing and organisational decisions.
- Use benchmarking and key metrics to evaluate options and improve resource deployment.
- Embed ICFP within the annual leadership cycle to support continuous improvement and effective governance.

Practical takeaways

- ✓ Leadership discussion framework
- ✓ Collaborative ICFP planning templates
- ✓ Real school case studies
- ✓ Strategic decision-making tools
- ✓ Annual implementation framework

By the end of the session you will be able to:

- Lead collaborative, evidence-informed financial discussions using ICFP.
- Engage senior leaders and governors in strategic financial planning.
- Use financial and workforce data to inform curriculum, staffing and resource decisions.
- Embed ICFP into your school's annual planning cycle.
- Make more confident strategic decisions that strengthen financial sustainability and improve outcomes for children and young people.

Financial Planning & Budget Assumptions

28 January 2027

BUILDING FINANCIAL CONFIDENCE THROUGH EVIDENCE-BASED PLANNING

Strong financial planning begins with robust assumptions. Effective budgets are more than financial documents—they are strategic plans that translate a school's educational priorities into sustainable financial decisions.

This practical workshop explores how to develop evidence-based budget assumptions, improve forecasting and strengthen medium-

and long-term financial planning. Delegates will examine how demographic trends, funding changes, workforce planning, inflation, curriculum decisions and organisational priorities influence financial sustainability, enabling leaders to build resilient budgets that support school improvement and withstand financial scrutiny.



Strong financial planning is not about predicting the future – it is about making informed decisions today that create sustainable schools for tomorrow.”

You'll learn how to:

- Develop robust, evidence-based budget assumptions.
- Build medium- and long-term financial plans aligned to strategic priorities.
- Improve financial forecasting using reliable data and intelligence.
- Understand national and local funding assumptions and emerging financial pressures.
- Plan for uncertainty by assessing financial risks and developing appropriate contingencies.
- Ensure financial planning supports educational priorities, organisational resilience and long-term sustainability.

Practical takeaways

- ✓ Budget assumption and forecasting templates
- ✓ Medium-term financial planning framework
- ✓ Financial planning and assurance checklist
- ✓ Risk assessment and contingency planning tools
- ✓ Budget scenario planning models
- ✓ Governance reporting templates
- ✓ Links to current DfE resources, guidance and tools

By the end of the session you will be able to:

- Develop robust, evidence-based budget assumptions with greater confidence.
- Produce more accurate medium- and long-term financial plans.
- Assess financial risks and build appropriate contingencies into budget planning.
- Use financial data and forecasting to support strategic decision making.
- Align financial planning with curriculum priorities, workforce planning and school improvement.
- Build a practical financial planning framework that strengthens long-term financial sustainability within your own school or trust.

Strategic Planning & Operational Leadership

18 March 2027

CREATING CAPACITY THROUGH OPERATIONAL EXCELLENCE

Financial sustainability is achieved through more than effective financial management – it requires strong strategic leadership, operational excellence and the effective deployment of people, processes and resources.

Drawing on the ISBL Three Pillars of Educational Leadership and the Operational Excellence Framework, this session explores

how strategic business leadership creates the conditions for teaching and learning to flourish. Delegates will learn how to connect curriculum, people and finance, improve organisational performance and create capacity by streamlining systems, reducing inefficiencies and ensuring every resource is aligned to the school's mission, values and strategic priorities.

“Operational Excellence is not about doing more with less; it is about creating the capacity to do more of what matters most.”

You'll learn how to:

- Differentiate between strategic and operational leadership.
- Connect curriculum, people and finance to support school improvement.
- Identify process inefficiencies, duplication and unnecessary workload.
- Apply Operational Excellence principles to improve productivity and financial efficiency.
- Use data and performance measures to support strategic decision-making.
- Create organisational capacity through smarter systems and effective resource deployment.
- Develop practical strategies for continuous improvement across business support functions.

Practical takeaways

- ✓ Strategic planning templates and implementation tools
- ✓ Operational Excellence self-assessment framework
- ✓ Process mapping and continuous improvement toolkit
- ✓ SWOT, PESTLE and strategic planning resources
- ✓ Risk management and assurance framework
- ✓ Capacity creation and resource optimisation checklist
- ✓ Action planning template for immediate implementation

By the end of the session you will be able to:

- Reduce inefficiencies and unnecessary workload.
- Streamline systems creating organisational capacity through reducing waste and improving processes
- Strengthen business operations to support teaching and learning.
- Lead strategic organisational improvement with confidence.
- Identify opportunities to improve financial efficiency and operational performance.
- Ensure business functions actively support teaching, learning and better outcomes for children and young people.
- Develop a practical roadmap for embedding Operational Excellence within your own school or trust.

Programme & Booking Summary

All delegates are encouraged to attend the **full** programme of sessions compiled to build knowledge, and confidence progressively. As this is a DfE programme delegates are required to book and select **each** date individually.

15th October 2026

Understanding & Utilising Integrated Curriculum & Financial Planning (ICFP)

TO BOOK:

Morning session:

10am – 12:30pm

BDSIP – DfE RITS REG (ICFP)

[\[click to fill in form\]](#)

Afternoon session:

1:30pm – 4pm

BDSIP – DfE RITS REG (ICFP)

[\[click to fill in form\]](#)

26 November 2026

Leading Integrated Curriculum & Financial Planning (ICFP) Together

TO BOOK:

Morning session:

10am – 12:30pm

BDSIP – DfE RITS REG (Leading ICFP Together)

[\[click to fill in form\]](#)

Afternoon session:

1:30pm – 4pm

BDSIP – DfE RITS REG (Leading ICFP Together)

[\[click to fill in form\]](#)

28 January 2027

Financial Planning & Budget Assumptions

TO BOOK:

Morning session:

10am – 12:30pm

BDSIP – DfE RITS REG (FP&BA)

[\[click to fill in form\]](#)

Afternoon session:

1:30pm – 4pm

BDSIP – DfE RITS REG (FP&BA)

[\[click to fill in form\]](#)

18 March 2027

Strategic Planning & Operational Leadership

TO BOOK:

Morning session:

10am – 12:30pm

BDSIP – DfE RITS REG (SPOL)

[\[click to fill in form\]](#)

Afternoon session:

1:30pm – 4pm

BDSIP – DfE RITS REG (SPOL)

[\[click to fill in form\]](#)

Essential Information

- Limited at 20 places for each session.
- Please arrive 15–30 minutes early to allow for registration. (Refreshments available.)
- All delegates attending either the morning or afternoon sessions are invited to stay for a networking lunch 12.30–13.30.
- Workshops held at **Eastbrook School**, Secondary Building, Dagenham Road, RM10 7UR.

Travel

- Limited parking available at the school and also available in surrounding streets.
- **Dagenham East Tube Station** (District Line): 16-minute walk or 103 bus.
- **Romford Station** (Train & Elizabeth Line): bus 174 from Romford Station to school.

Establishing a Network

A key ambition arising from this programme is to establish an ongoing Headteacher and School Business Leader Finance & Operations Network for schools in the locality.

The network will provide a regular forum for educational and business leaders to continue learning together, share expertise, explore emerging financial and operational challenges and develop practical solutions beyond the four programme sessions.

Why is the Network needed?

Strong schools depend on educational, governance and business leadership working together. Financial and operational decisions are inseparable from decisions about curriculum, staffing and school improvement, yet these areas can too often be considered in isolation. The principles underpinning the Three Pillars of Educational Leadership reinforce the importance of business and operational leadership alongside educational leadership and governance. Effective finance, HR, estates, IT, procurement, compliance and administration are not simply support functions; they provide the systems, capacity and infrastructure that enable teaching and learning to flourish.

With schools facing increasing financial pressures, workforce challenges and growing expectations around value for money, there is a strong case for leaders to collaborate more effectively, share intelligence and avoid solving common problems independently.

Purpose of the Network

The network will create a trusted space for Headteachers and School Business Leaders to:

- Share financial, operational and sector intelligence and explore the implications for local schools.
- Continue developing expertise in ICFP, benchmarking, budget planning and strategic resource deployment for greater financial and operational sustainability.
- Discuss core business and operational functions and their contribution to school improvement.
- Share effective practice, tools, systems and solutions across schools.
- Identify opportunities to reduce duplication, improve processes and create organisational capacity.
- Explore Operational Excellence and continuous improvement approaches that strengthen efficiency without compromising educational quality.
- Strengthen collaboration between educational and business leaders so that curriculum, people and finance are considered together.
- Build collective capability, resilience and professional networks across the borough.

Our ambition is to create a sustainable professional network that strengthens strategic leadership, improves financial and operational resilience and ensures more time, expertise and resources can be focused on what matters most teaching, learning and outcomes for children and young people.

For more info contact:

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