

# Integrated Curriculum Led Financial Planning



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# 2<sup>nd</sup> March 2016

- SPTA in National Headlines for all the wrong reasons – poor Governance of the past
- A collection of schools in crisis (not really a Trust)
- 46 Academies - 3 Academies leaving the Trust in Sept 16.
- Financial crisis in all Secondary Academies (Projected loss of £20.6m over next 7 terms)
- No structures to support School Improvement – declining standards overall
- Educationally failing in almost all academies
- No central targets, tracking
- Leaders unsupported with little challenge, accountability or CPD
- Part of the problem for children in the North of England and not the solution



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# This Time Last Year – 3 Years Projected Budgets 2015 - 18

	Brought forward Sept 15	Surplus/ (Deficit) 2015/16	Surplus/ (Deficit) 2016/17	Surplus/ (Deficit) 2017/18	Carry Forward Aug 2018
	£'000	£'000	£'000	£'000	£'000
Secondary and All Through	16,644	(4,682)	(7,289)	(8,794)	(4,121)
Primary and AP/Pru	9,149	(1,924)	(724)	(949)	5,552

£20.4m cumulative deficit over 7 terms



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# Timeline

**Day One:** I met with Core Leadership Team and expanded it to include the 3 Regional Directors and Compliance Officer. Reviewed the performance of the Trust's academies and reassigned responsibilities to ensure accountability. (Not 14 schools each)

**Day Two:** Worked on a Curriculum Led Financial Plan for all secondary academies

**Day Three:** Met with the National Unions (JNC) and appraised them of the financial position of the Trust. Presented the same financial data and set out a new vision for the Trust to all Principals and Chairs of Education Advisory Bodies (Former local governing bodies)

**Day Four:** Met with Principals from 8 of the most poorly performing and financially challenged academies and trained them on CLFP. (Brown Envelopes)

**Day Five:** Met with these Principals and Vice Principals to write re-structuring booklets

**WEEK TWO** – Similar pace, training all Board members on CLFP and gaining written resolution to start restructuring of 8 academies. Union and staff meetings held in local academies.



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## Actual Secondary Academy Example - budget situation

2015-16 £269,025 in year deficit  
2016-17 £623,312 in year deficit

### Immediate Action March 2016

Restructure teaching staff  
Restructure support staff  
Relationships with unions



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# Financial Impact of Restructure

Before restructure		After restructure	
2015/16		2018/19	
Total number of pupils	1010	Total number of pupils	1080
No of FTE	73.8	No of FTE	55
No of PPW	25	No of PPW	25
Average Teaching Load	15.82	Average Teaching Load	19.7
Cost per lesson	1806	Cost per lesson	2361
Curriculum Bonus*	21.6%	Curriculum Bonus*	6%
Contact ratio	0.63	Contact ratio	0.79



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# Financial Impact of Restructure



## Current position – Same Academy

2021/22	
Total number of pupils	1081
No of FTE	54.6
No of PPW	25
Average Teaching Load	19.8
Cost per lesson	2379
Curriculum Bonus	6
Contact ratio	0.79

Financial position	2020-21	2021-22	2022-23
Total Income:	7,061,434	6,878,435	7,323,206
Total Expenditure:	6,158,628	6,688,575	6,623,861
In Year Surp/(Def):	902,805	189,860	699,345
Surp/(Def) B/Fwds:	493,697	1,396,502	1,586,362
Cumulative C/Fwds:	1,396,502	1,586,362	2,285,707

# Quick calculation- from performance tables 2018/19



## School workforce

	School	England secondary schools 2018/19
Teachers:		
Total number ▶ <a href="#">more info</a>	135	219,269
Number of full-time equivalents ▶ <a href="#">more info</a>	127.9	203,686
Pupil to teacher ratio ▶ <a href="#">more info</a>	15.3	16.3
Average salary per full-time equivalent ▶ <a href="#">more info</a>	£40,072	£40,571



# Quick Calculation

Pupils on roll = 1956

Pupils  $1956/19.75 = 99$

(FTE teachers required to run at 8% bonus and contact ratio of 0.79)

Actual FTE – Required FTE =  $135 - 99 = 36$

Potential annual savings =  $36 \times \text{£}40,000 \times 1.28 = \text{£}1,814,400$



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Questions?



Thank You



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