

# Finance Information Sharing 4 PAN reduction process and cost saving ideas

**Richard Woodfin – Primary Education Adviser**

# The Team - EIP

- **Michael Hawkins – Head of EIP**
- **Jason Hughes – Primary Education Adviser**
- **Caroline Ryder – Education Improvement Adviser - SEND**
- **Nicki O'Flanagan - Education Improvement Officer**

# Proposed Session Order

## Proposed sessions

1. Overview and outline
  2. Re-structuring – when do you need to consider it – Bob Charlton Schools HR  
Deficit Budget Procedures – Greg Watson Schools Finance Officer
  3. Pupil numbers – forward planning / reduction in PAN – conditions to consider applying
  - 4. Cost saving strategies and ideas / PAN reduction process – Jenny Chalmers school admissions**
  5. Income generation and additional grants
  6. Flexible thinking / resource sharing / any other ideas
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# Overview of session 4

- Rationale for the session
- People you may need to make contact with
- PAN reduction process – Jenny Chalmers
- Questions and Reflection
- Cost saving suggestions and sharing of ideas
- Conclusions
- AOIB

# People

- **Sailesh Patel** – Lead Business Partner
- **Ndenko Asong** – Strategic Lead Finance Business Partner – Education
- **Nav Minhas** – School Place Planning and Policy manager
- **Greg Watson** – Schools Finance Officer
- **Nina Yasin** – Schools Finance Officer
- **Davinder Devgon** – Schools Finance Officer
- **Steve Denbeigh** – Assistant Finance Business Partner
- **Andy Moore** – Assistant Business Partner
- **Robert Clark** – Senior Business Analyst
- **Laura Baldry** – Admissions manager
- **Bob Charlton** – Schools HR
- **Michael Norton** – Head of Capital Programmes

# PAN Alteration Process

**Jenny Chalmers**  
**Senior Admissions and Access Officer**

# Reflection and Questions



# Statutory Responsibility

- Providing Education
- Safeguarding Children
- Admissions
- Attendance
- SEND provision
- Health and Safety
- Equality and Diversity
- Assessment and Reporting
- Data Protection
- Financial Management



# Cost saving suggestions

- Stop doing things that cost a lot of money and you don't NEED.
- Have you got your HR in order from a financial perspective – contracts / rates of pay / pay scales / pension contributions.
- Bulk purchasing – team up with other schools / buy more at the beginning of the year.
- Shopping around for the best deals – change your suppliers / commit to longer term contracts if appropriate.
- Manage your disposable resources more effectively.
- Staff value for money and effective performance management systems –  
Site staff – constant monitoring  
Break and lunchtime staff – re-assess needs / combine roles  
Swift action to stop avoidable staff absence - SLT

# Cost saving suggestions

- Accurate budgeting / up to date? – don't estimate and get a shock
  - Specific linkage to the school development documents – accurate figures / do you have to do it now / can you create economies of scale in any way – link two areas together?
  - Thorough and rigorous monitoring – are the Gobs up to the job / is the information the school provides clear, accurate and not misleading.
  - Technology – can you cost save using technology / reduce hours / combine roles / get things done more efficiently
  - Online resources / open access – are they more cost efficient / promotion of flexible working for some staff – more cost effective?
  - Re-structuring if necessary (see session 2)
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# Cost saving suggestions

- Energy efficiency – bulk procurement
- Energy management systems and accurate monitoring
- Outsourcing may be more cost effective – tread carefully!
- Go to paperless communication (or as close as you can realistically get)
- Stay in touch with the current markets and relevant costs
- Combining classes – part of re-structuring but worth a specific mention
- Get an outside/ objective perspective from someone who understands the challenges and how the systems work. You might not **want** to change something, but you possibly can, and it would be a saving.

# Conclusions

- Cost saving is difficult especially when you get locked into a particular way of doing things.
- Get support with constructive challenge around your non-negotiables especially concerning staffing.
- Ensure you have a 'change team' for any 'de-implementation' you embark upon.
- Always keep one eye on the statutory requirements and the schools capacity to provide what it needs to.
- Ask for help – stay open as hard as this may be.
- Accept the uncomfortable nature of the change – it is uncomfortable.

# Emotions / Support

- Working with a deficit and staff re-structuring is emotionally challenging **for all involved**
- Personal reflections - I went through a range of emotional responses
  - Fear
  - Disappointment
  - Shame
  - Anxiety
  - Anger
  - Euphoria!
- As leaders, where are you getting your support from – it's so important!

**AOIB**

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**Please let us know if you are planning on  
any form of re-structure.**