

Personalised Video or Telephone Consultation

Now that you have a Comparative **Financial Performance Report** and **Historical Report** using the **Financial Survey for Schools (FSS)**, why don't you meet with us via video conference to discuss results to help identify and quantify strengths and weaknesses plus opportunities for improvement?

We start by discussing the attributes of a financially sustainable school, then apply this to your school's individual reports.

This is not a general presentation; it is an informed discussion on your school's results. We carry out preparatory work, but this is not a detailed review as per the **Board and Mgt Presentation** flyer.

And don't be concerned about your level of financial understanding. We pride ourselves on being able to explain crucial financial information in way that is digestible irrespective of your financial literacy.

Financial confidence now and into the future!

This is a great opportunity to discuss your school's development plans to see what's possible and what can be done to make your plans viable.

This process will help diagnose your school's financial health and set quantifiable targets to maintain or strengthen your school's financial position. The objective, data-driven, factual nature of the analysis means you can take it to decision makers in a defensible form.

Our goal is to help you identify the issues, targets, and best places to look for improvements.

Your personalised school consultation includes:

- Peruse your data entered into the **Financial Survey for Schools (FSS)**
- Select a number of like-school samples to choose one that best suits your school's analysis
- Generate and analyse the latest Comparative **Financial Performance Report**
- Generate and analyse your school's **Historical Report** – past six years performance
- If available, review your Somerset Key Indicator **SKI Report** – past two and future five years
- Explain the attributes of a financially sustainable school
- Explain key ratios and what they indicate with reference to pages in your reports
- If available, on-the-fly forecast of financial performance using the **SKI Scenario Builder**
- Summarise and quantify your school's financial strengths and weaknesses
- Discuss your school's plans and what is required to support them
- Prioritise an action plan and suggest policies and targets.

Estimated fee, depending on circumstances, is \$790 plus GST.

We require your school to subscribe to the **Financial Survey for Schools (FSS)** including the **Historical Report** and preferably your **SKI Report** because we use this information for analysis and discussions.