

CIPFA Diploma in School Financial and Operational Leadership

Helen Burge, Deputy Chief Operating Officer, The Priory Learning Trust

Helen chose to study the CIPFA Diploma in School Financial and Operational Leadership in 2019. She successfully completed the course in 2020.

Helen is the Deputy Chief Operations Officer for The Priory Learning Trust. In November 2017, Helen became a Fellow of the Institute of School Business Leadership. She is a School Resource Management Advisor (SRMA) for the Cotswold Beacon Academy Trust and is also the leader of the Somerset School Business Leaders ISBL regional group. She regularly blogs to share her thinking, her ideas on how to juggle her exciting role and to share good practice. She can be followed [@DeputyCOOatTPLT](https://twitter.com/DeputyCOOatTPLT).



What made you choose to do the CIPFA Diploma in School Financial and Operational Leadership?

I haven't got a specific Finance qualification and the CIPFA SFOL also contains the Certificate in Financial Reporting in Academies, so I felt that both qualifications would enhance my financial and operational knowledge and tick a box in the future for a financial qualification. In addition, I felt it was the right qualification for me as I was stepping out of school and into the Central Team as Deputy COO, so to study for a qualification which would have that specific MAT overview was going to inform my practice.

How did you go about getting approval from your line manager to do the programme?

I had mentioned it as part of my appraisal process the year before and so it was included as a possible CPD option. Then I asked ISBL to provide a course in the Bristol area, rather than London or Birmingham. They were receptive to this, if we could get the right numbers to sign up for the course. So when the course became available in the Bristol area, I used this as another lever to convince my line manager that completing the course locally rather than adding travel time and costs to the course costs was a good idea.

How did you manage to balance a full-time job and studying?

Not sure I did manage this! It was hard work, there is no denying it. I worked lots of weekends to complete the studying. Studying whilst refreshed would have been easier. This was made harder by COVID19 lockdown and the pressure on school business leaders to perform additional tasks to their already busy schedules. I squeezed the studying in on a year when neither of my sons were doing any major exams, it felt like the house had a bit more breathing space as a result! Top tip would be to chip away at the reflective activities soon after the face to face session, so schedule in some time immediately after to try and get your initial thoughts recorded. Don't leave the reflective activities to the last minute, use the tutors for support.

What was the most challenging part of the CIPFA programme?

Definitely the Certificate in Financial Reporting in Academies for me, as there is a lot of work involved in that, lots of concepts, most I knew already but I use accounting software systems to help. Learning how to do them by hand, as it were, was more complicated than I thought it would be. The timing for the test is very tight, it doesn't give you much thinking time, you really do have to know your stuff and be quick to recall the information.

What has been the most rewarding aspect of the CIPFA programme?

Passing my Certificate in Financial Reporting in Academies (Cert FRA) was a joyous day! You only have three attempts at it, so you feel the pressure and it's a high pass mark to achieve. You also must complete it within 6 months of starting it, whilst also working on the reflective activities of the other modules. I was literally on cloud 9 when I passed as I had been worried about it. Some people in my cohort had already completed the Cert FRA prior to starting their programme, it felt like I was catching up with them the whole time until I passed!

What would you say to anyone who is considering the CIPFA programme?

I would consider what else is going on in your life – do you have children studying for exams?, what impact would your studies have on them? Would you like to move into a Central Team role? Is there someone else you could encourage to do the course with you?

How has the CIPFA programme developed you as a professional?

It feels like it has tied up a couple of loose ends for me. It's made MAT strategic thinking click into place and I've got a greater appreciation of how the aspects of financial and operational leadership relate to each other. I think this course has improved my ability to communicate concepts to others in the Central Team, Trustees, school business professionals, Principals etc. It's helped me as I transition from academy to MAT Central Team. I was also able to network with a new group of School business professionals, which was great. Some of them I knew from

#SBLTwitter but the majority I hadn't met before. It was good to hear their experiences and how their MATs have developed and how they hoped to develop them further in the future.

What are the on-the-job benefits of doing the CIPFA programme?

Nearly all the reflective activities are focusing on your current work practices, this allows you to identify improvements. For example, one of the benefits of completing the CIPFA SFOL was the increase in my understanding of audit, assurance, and internal scrutiny. I've been able to apply my knowledge immediately to help my MAT with reviewing current internal scrutiny practices and make suggestions for improvements. I've also been able to tweak other aspects of operational processes, to improve the workflow or increase others understanding of why we follow a certain procedure.

The great thing about the CIPFA programme is that you don't have to reference documents or create bibliographies, contents and indexes, so the bit that seems to take the longest amount of time in other courses isn't there!