

Educ8tions Ltd.



Business Strategy / Plan  
(BS/P)  
Apr 2018 – Apr 2019



## Document Control

**Document Title:** Business Strategy / Plan

**Document Number:** **G8C7**

**Author:** Vonley Joseph

**Change Authority:** The Board of Directors

## Change History

Version	Date	Reason for change	Change by
0.1	01 <sup>st</sup> August 2016	First draft	Vonley Joseph
0.2	02 <sup>nd</sup> April 2018	Updated	Vonley Joseph

## Change Mechanism

Any person(s) seeking to alter this document must consult the author before making any change.

Educ8tions Ltd. Change Authority must endorse any alterations to the approved version of this document before any wider dissemination of the altered document.

The person making the alteration must indicate every change between the previous (approved) document version and the altered document version.

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# Educ8tions Limited

## Developing People for Sustainable Careers

67-68 Hatton Garden, London EC1N 8JY

Website: [www.globaleduc8tions.org](http://www.globaleduc8tions.org)

### Our mission is:

To provide an outstanding education to develop people and change lives

### Educ8tions values are:

- Empowerment
- Dedicated
- Understanding
- Competent
- Ambitious
- Team
- Inclusivity
- Outstanding
- Nurture
- Successful

### Educ8tions approach is:

- To act with trust, respect and integrity
- To influence thinking and lead action in the fields of adult education and social change
- To generate innovation, creativity and imagination
- To inspire learners and value the wealth of experience learners bring to the Training Centre
- To have a positive, caring and can-do attitude with honest and open communication

### Strategic Themes

#### Identity and Distinctiveness:

- To be at the forefront of educational and social transformation by providing residential and community learning opportunities
- For individuals which challenge, raise aspiration and achievement and cause learners to question and evaluate; to play a full part in a changing society
- For communities to engage with excluded groups and support the regeneration of communities, to promote social inclusion and community cohesion
- For community and trade union activists, to support the development of skills and understanding to further the aims and social purpose of their organisations

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### Effectiveness:

- To be excellent in all our work, building on our strengths

### Partnerships:

- To develop and sustain productive partnerships with trade unions, voluntary and community sector groups and organisations, local authorities and employers; which support the development of individual and group skills and aspirations and further both the College mission and partner organisational objectives

### Efficiency:

- To make best use of our resources to achieve our mission and goals
- To maintain sound finances to underpin our work
- To maintain a commitment to sustainable working practices which minimise the impact of the our work on the wider environment

### Innovation:

- To be imaginative, creative and enterprising: open and responsive to new areas and ways of working to further the mission
- To work in innovative ways which celebrate and draw upon the experience and knowledge of staff, students and their communities, sharing expertise and learning from each other





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### Forward

The last few years have proved challenging and are still challenging for businesses of all types, both in the Public and Private sectors across the global economies. This has forced companies to rethink their strategies and look at ways of operating more efficiently and economically whilst trying to maintain the quality of service and the products that they provide.

Educ8tion's situation is no different. We have had to rethink the way we engage with our customers more efficiently, we have had to look at new and better methods of delivering our products in a leaner and more efficient way whilst still maintaining the highest quality levels.

Change is never easy; in fact change brings its own challenges and this has been the case for us over the last year. Changing the culture of how we operate will not always fit with every individual within the organisation, especially after many successful years delivering in a way that has brought success.

In 2014 The Board of Educ8tions set out our vision of the future in our Missions and Values Plan and we are working to achieve these targets.

With the new policies that have been driven from UKBA and QCF, this put hold to the vision and direction of the company.

Steven Wingate took the Company over late 2013, he drove the company forward and helped it to achieve its ISO 9001, 14001 and 18001. Additionally we achieved our Bronze Investors in People accreditation in February 2014. We have gained contracts with to companies Babington Group and EYS; both of which involve Apprenticeships and 24+ Learner Loans. We have additionally gained Centre status with six Awarding Organisations. In August 2014, Steven Wingate surrendered his Directorship and created a new Board of Directors, this consists of Scott Halliday (Learning and Development), Louise Singleton (General Director) and Joseph Singleton (Business Development).

Our Business Plan this year continues to support the vision and ambitions we have. This can be viewed from our website in range of reports and meeting planned for this year.

This year's Business Plan theme is: 'Back to basics and aim for gold' this theme is based on using the current systems and processes to help drive the business forward and ensure that we achieve at least the minimum in all we do. However, through this aim we hope to strive for success and reach the best we can be, by following standards and regulations set whilst adding the Educ8tions twist on the work we do; we will do this by pioneering new ICT processes into all aspects of the company and ensuring that all staff are as highly trained as possible.

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**Our two key operational focuses are:**

<b>a)</b>	<b>To deliver the financial budget targets as a minimum</b>	All financial targets are achieved in line with the budget and actions are taken throughout the year to address any variances from budget.
<b>b)</b>	<b>To deliver the quality requirements and achievements on all contracts to meet grade 1 expectations</b>	Success rates are consistently above 80% and actions are taken to address shortfalls throughout the year.

**Key Business Indicators (KBI)**

In order for us to measure the performance of the company we have developed Key Business Indicators (KBIs) that will be at the core of everything we do. The Business Plan is structured around the KBIs and the strategic objectives in order to deliver our Plan targets.

**Business and Financial KBIs**

<b>KBI 1 – Contract Performance</b>	
1.1 16-18 Starts/19+ Starts/24+ Starts against profile count of numbers of starters to the programmes, based on the funding age of the learner. Profiles as supplied by each department	1.2 Timely achievements of learners on all contracts count of numbers of achievements gained within 3 months of the planned end date of learning, broken down into the year/month they planned to leave. Method is exactly the same as the SFA / Ofsted measure – age is based on the age of the learner on the day they started training
1.3 Success rates above 80% on all contracts count of numbers of achievements gained within the planned end date of learning or the actual end date of learning, whichever is higher – broken down into the year/month this happened. Method is exactly the same as the SFA /Ofsted measure – age is based on the age of the learner on the day they started training	1.4 Completions count of numbers of achievements gained by, in the year/month they planned to leave. Achievements are the numbers gained within the planned end date of learning or afterwards. Leavers are numbers awaiting certificates or have left early. Remainder is the number of learners due to achieve in the remainder of the contract year





<b>KBI 2 – Budget Management</b>	
2.1 Income targets achieved to monthly budget profile rolling count of income to budget for the financial year – per income generating departments	2.2 Expenditure targets achieved to monthly budget profile rolling count of expenditure to budget for the financial year – per all departments
2.3 Departmental surplus achieved to monthly budget profile Rolling count of surplus to budget for the financial year per all departments	2.4 Salary cost as a percentage of income rolling count of salary costs against income for the financial year – per income generating departments
2.5 Course costs as a percentage of income rolling count of course costs against income for the financial year – per income generating departments	

**Personal and Performance KBIs**

<b>KBI 3 – People and Quality Management</b>	
3.1 Effective management of departmental HSE and housekeeping	3.2 Engagement of teams to drive performance
3.3 Effective performance reviews delivered to business plan outputs	3.4 Effective management of business and quality assurance

<b>KBI 4 – Customer Service</b>	
4.1 Timely responses to customer call volumes and response times for external calls into the service centre – calls answered within 10 seconds	4.2 Meeting and exceeding customer expectations
4.3 Dealing with complaints in a timely manner Number of complaints logged and dealt with, per department – resolved within 7 working days	







**KBI 5 – Membership**

5.1 Number of Memberships, number of current member companies – by lead department	5.2 Number renewed year to date, number of member companies who renewed this year – by lead department
5.3 Number sent out number of memberships packs sent out this year – by lead department	5.4 Number joined, number of new member companies this year – by lead department

**KBI 1 Contract Performance:**

**Contract Performance**

Government funded income from both the Skills Funding Agency (SFA) and the Education Funding Agency (EFA) by subcontracting we are hoping to receive revenue; in 2014/15 around £70,000. This is a significant sum for around 250-500 learners.

In line with our main aim targets the shift back towards 16 - 18 year old apprentice recruitment; the government's priority group. In some sectors such as Health and Social Care, which has had another poor year nationally, recruitment plans and company business development strategies are set; they look and feel robust.

Other new funding opportunities such as the ESF Workplace Learning contract and the NEET 19+ Apprenticeship contract have not been maximised. The implementation of our new Pre-Apprenticeship programme got off to a slow start however most teams have now developed a sound offer. The redevelopment of adult programmes started in December and has generated significant demand.

We hope to have a full range of level 5 - 8 Awards and Diplomas with Partnerships with Universities.

**KBI 2 Budget Management**

A recent survey of 1000 of the fittest global companies to discover how they had remained leaders in their field in the recent downturn showed surprising results. The top five traits of strength displayed by these successful organisations were:

1. Strong corporate decision clarity;
2. Decision makers received intelligence about the trading environment quickly;
3. The organisation showed courage of conviction when delivering its business plans;
4. No boundaries were in place to stop horizontal information flow; and
5. Frontline workers have the information they need to understand how their actions have bottom line impact.







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In fact 12 of the top 17 traits of strength involved companies making clear and quick decisions and were not dependant on structure.

It was interesting to read these results as it endorsed the developments that we need to make in the coming year to further the Finance Development Plan. The five traits listed above are key for the success of our centre in the coming year. In order to strengthen the financial decision making and within our non-profit side we will:

- Roll out the dashboard system so that every member of staff is aware of their own and their department's performance of the KBI's.
- Deliver financial, risk and contracts training to all staff to strengthen their understanding of their importance and value to our centre. The training will clarify the necessity of delivering quality, timely vocational training and how this improves our finances and our ability to continually improve.
- Lengthen our detailed operational planning timeline from one year to three so that we can react quickly to proposed market changes.
- Ensure we capture market data and information for all sectors so that we can move into emerging training needs to keep our sectors strong and deliver an appropriate service to our learners.
- Continue to develop our e-processes to strengthen our delivery and to cut administration time and to improve our corporate information flow.
- Develop team Business Plans so that all staff understand their team's objectives.

As a centre we need to ensure our frontline staff are equipped with the tools, understanding and the time to deliver national, quality training to the maximum number of learners. Our aim will be to reduce the meeting culture of our organisation and to turn it into a 'can-do' delivery culture. As an outward facing organisation we need to shout about "Why us?" more, and broadcast our many successes. We will improve our social media presence and use a staff based project group to help shape this. We will also develop a three year marketing strategy to improve our brand awareness nationally.

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### Financial Performance

Summary Profit and Loss Account can be seen at the end of the plan, this is a quick summary.

	Actual 31Dec2014 £'000	Budget 31Dec2014 £'000	Variance £'000	Budget for Dec 14/15 £'000
<b>Income:</b>	0.00	0.00	0.00	<b>0.00</b>
<b>Employment costs:</b>	0.00	0.00	0.00	<b>0.00</b>
<b>Direct expenditure:</b>	0.00	0.00	0.00	<b>0.00</b>
<b>Overheads:</b>	0.00	0.00	0.00	<b>0.00</b>
<b>Total expenditure:</b>	0.00	0.00	0.00	<b>0.00</b>
<b>Net profit:</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

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No: Key Objectives:

SMT: Result:

<b>Customer</b>		
1	Establish an active social media presence that engages the world and doesn't just broadcast to it	Social media, policies - Our Educ8tions site now has links to social media sites. Our Social Media is monitored through the Director of Business Development
2	Develop and launch a membership structure/offer that embraces all employers	We are looking to appoint a Bronze, Silver, and Gold standards for employer engagement
3	Implement sector based employer forums/networks	We are looking to undertake networking to develop stringing groups to develop best practice in Equality and Diversity, Health and Safety and Safeguarding
4	Produce a clear marketing strategy to raise our profile with customers and stakeholders both locally and nationally	Our Marketing Strategy is clear and robust showing a clear recruitment process
<b>People</b>		
5	Continue to support the growth in capability of all staff in realising the company's business ambitions and vision	We are going to hold online meetings and peer review groups. Our policies are online and are free to all people to view and comment
6	Provide strong, positive and resilient leadership which involves and motivates staff to fulfil their potential and to deliver high performance	We are going to hold review meeting and focus groups for all stakeholders, to feed into our SAR
7	Implement a strong, robust corporate retention strategy and plan which enables organisational stability, development and high achievement	Under review – this will remain in review until early 2015.

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	(based on sound analysis and investigation of attrition data and evidence)		
8	Continue to embed an outstanding corporate behavioural Health and Safety culture and standards across the company to ensure a zero tolerance for accidents and high ownership by all		We have undertaken self-assessment for ISO18001- and awaiting feedback
9	Develop a corporate culture of engagement which drives teamwork, accountability and responsibility which encourages, recognises and supports continuous high performance		We have clear company guidelines with set KPI's for each outcome and job role this is reviewed monthly in company 1-2-1
10	Continue to develop organisational capability and change in accordance with custom and business requirements		With our monthly 1-2-1 and meetings we will review the Business Strategies and plan. Using this a rolling tool
			<b>Quality</b>
11	Redefine the corporate quality framework		Educ8tions works toward many quality frameworks and will need to redefine a company one that embeds; Ofsted standards, IIP, Matrix, ISO and Awarding Body
12	Develop our capacity for critical self- assessment to drive the Grade 1 culture		SAR and QIP
13	Embed dashboards to drive and inform business assurance, quality, finance and contract management processes		Under review:
14	Review and develop internal audit capacity and scope		Educ8tions works towards many quality frameworks and will need to redefine a company one that embeds; Ofsted

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			standards, IIP, Matrix, ISO and Awarding Body
15	Implement ISO 9001 across the business		Educ8tions works towards many quality frameworks and will need to redefine a company one that embeds; Ofsted standards, IIP, Matrix, ISO and Awarding Body
<b>Investment</b>			
16	All staff have the information and the knowledge to understand the bottom line impact of their decisions		Each staff member will have a profit and loss report linked to KPI's that supports their financial risk for example; poor quality paperwork or missed visits. This risk will be used within the 1-2-1
17	Enable teams to maximise resources and opportunities in terms of ICT and facilities		A set of training resources DVD's have been made for all Staff to up skill staff in using Key ICT
18	Standardise company software and deliver ICT training to all staff to ensure they have the ICT skills they need		We are in the process in standardising our ICT resources, from equipment for staff to learners to undertake their awards
19	Carry out a desktop review of the ICT refreshment plan and develop a strategy to refresh our ICT capabilities		This policy is yet to be formalised, however we are due to review our ICT systems early 2015.
20	VLE review and impact assessment		We will at the end of our first contact year undertake a VLE assessment and review the process and cost implications
21	Develop and implement a strategy for the continual development of the Educ8tions estates and facilities to meet future demand and requirements		Under review – we have, as a company, decided that estate does not need development with the current size of the team, facilities are being reviewed in Jan 2015 once profit has stabilised
22	Establish an electronic fixed asset register, ensure all		We now use three systems, the Learner Dashboard, FormCentral

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	assets are recorded and tagged; this is an update of the current registers		and the Database.
23	Develop a long term financial planning process that captures future investments and expenditure to inform financial business decisions for the future		This will be an ongoing assessment
24	Structured strategic sector reviews take place annually to determine future markets and investment		Include within the SAR
25	Grow the pre-apprenticeship programme across all operational delivery teams and maintain growth within the core pre-apprenticeship programme		We will undertake a marketing campaign to attract new funding to help support our delivery
<b>Partnership</b>			
26	Strategic review of all partnership and networking activities		This will be supported with our monthly meetings and reviews of ISO9001
27	Identify new and extend existing third party relationships to maximise contracts/sales potential		We have appointed a Director of Business Development and Funding. We have also undertaken a review process of CRM software to ensure we maximise contracts and sales
28	Develop a framework to ensure that the relationship between employers delivers sustainable progressions for learners		Review to be undertaken
29	Develop strategic partnerships with the HI for progression		Director of Learning and Development to ensure progression is a swift transition

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## **KBI 3 People & Quality Management**

In accordance with our corporate vision and mission and in order to realise our business objectives, it is essential to continuously develop all staff and to provide the essential health, safety and environmental standards in which this is supported and achieved.

The Key Business Indicator of People and Quality Management, with its associated Key Performance Indicators, ensures accurate and continuous corporate measurement of People Performance and Quality Standards against the business plan requirements and corporate standards. As more learners and employers hear of our outstanding service; more learners can be trained. We will maximise our funding and the strength of the centre will increase.

***The future will be shaped by our belief about what we are and who we can be.' This holds true for our learners and for us as a business!***

### **Key Performance Indicator (KPI) 3.1 Effective management of departmental Health, Safety Environment and Housekeeping**

This indicator is critical in regards to the wellbeing and safety of all staff in the business and measures

All critical elements of health, safety, environment and housekeeping through robust continuous corporate audits and action plans through the company Health and Safety Committee structure.

The vision to achieving an outstanding health, safety and environment culture will continue to be driven through enhanced health, safety and environmental policies, procedures and practices, benchmarked to high standards e.g. launch of behavioural safety and the embedding of risk management.

### **Key Performance Indicator (KPI) 3.2 Engagement of teams to drive performance**

The performance and capability of the company is founded on the concept of a high performance team based culture. This is very much focused around team based practices and operations and team development interventions, such as team based value planning. Employee engagement is a critical enabler to team working and is measured through the Human Resources department's regular engagement surveys and through the "Top 100 Best Companies" process. The "Leader as a Coach" development intervention is integral to achieving high engagement with people and teams.

### **Key Performance Indicator (KPI) 3.3 Effective performance reviews delivered to business plan outputs**

The critical corporate Human Resources process for delivering the business plan objectives and for measuring staff performance and developing capability is the Staff Performance Review Process. This process is subject to continuous enhancement by the Human Resources Department and an electronic Staff Performance Review Process are looking to be implemented.







This indicator is central to measuring corporate staff performance and capability through regular published audits, by the Human Resources department, utilising the Human Resources database.

This measurement comprehensively addresses the effective application and quality of the utilisation of the electronic Performance Review process.

The prime focus in enhancing the future effectiveness of the electronic Performance Review process is through further training and development of leadership, embedding and developing the process and action plans around the evaluation of operational process data.

### **Key Performance Indicator (KPI) 3.4 Effective Management of Business and Quality Assurance**

The role of business assurance has been broadened across the company. Internal audit activity is a critical part of assuring that business processes and practices comply with internal, external and legislative requirements. However getting it right first time is a much more efficient use of resource and reduces the need for detailed scrutiny and repair.

Our aspirations are to be outstanding in everything we do which means going beyond compliance. In the past few months we have undertaken a significant data cleansing and file management exercise and internal audit results indicate that we still have more to do. Our approach to risk management is now well developed but needs to be further embedded across the company.

A new dashboard system will support managers by providing critical information to improve decision making and performance management.

Our priority for 2014/15 is to further develop a critical self-assessment process that drives a Grade 1 culture.

We will do this by engaging in peer review activity, developing staff and by using performance data more effectively in making judgments.

### **ISO 9001, 18001, 14001**

This year the business has made the decision to implement ISO 9001:2008, the key internationally agreed standard for quality management systems. The advantages we hope to achieve include: increased customer satisfaction.

We look to exploit new markets, both in the UK and overseas; and greater consistency in the quality of our services through more rigorous control of our processes and hope to gain BAC by the end of the year.

Achieving ISO 9001 certification could lead to new business; and not only will it help distinguish Educ8tions from competitors, but many large businesses and public sector organisations require suppliers to be ISO 9001 certified. It is a globally recognised achievement that we hope will help to raise the profile of our business as well as ensure that we have the people, infrastructure and work environment needed to implement



and improve our quality systems. Currently the company intranet hosts 106 procedures; too many policies and procedures can become counterproductive. Implementing ISO9001 is the perfect time to revisit old policies, adjust antiquated procedures and empower our employees to become the driving force to introduce more appropriate procedures.

### **Our priorities for 2014/2015 are to:**

- Develop a critical self-assessment process that drives the Grade 1 culture
- Embed audit of contracted provision to reduce errors and secure earned income
- Further develop quality indicators that feed into dashboards to measure and improve performance
- Redefine the corporate quality framework by updating strategies and policies to drive up business assurance and quality across the organisation
- Review and develop internal audit capacity and scope

### **KBI 4 Customer Service**

The importance of continuous customer service excellence is fundamental to Educ8tions Ltd. current and future success as a business. It is essential that at all times we understand our customer needs and provide a high quality responsive service.

The Key Business Indicator of Customer Service, with its associated Key Performance Indicators, ensures the accurate and continuous corporate measurement of our customer performance and standards against the Business Plan requirements and corporate standards.

#### **Key Performance Indicator (KPI) 4.1 Timely responses to customers**

It is essential that all customer calls and queries are treated professionally, consistently and in a timely manner. To this end the introduction of the Corporate Shared Services department has now centralised all company calls and queries into the business.

This indicator now measures the volume, quality and timeliness of responses to customer queries against service level agreed standards which are reviewed monthly at the level of the Executive Management Team. Furthermore, this indicator is driving continuous improvements in this critical area of response times.

#### **Key Performance Indicator (KPI) 4.2 Meeting and Exceeding Customer Expectations**

Corporate Strategy is very much focused on not only meeting but exceeding customer expectations. To this end a two day module of Customer Service is being delivered to all staff, with the priority emphasis on behavioural development.





A suite of learner surveys have been rationalised and there is now a common one-to-four rating scale to measure overall learner satisfaction. Current responses are encouraging.

### **Key Performance Indicator (KPI) 4.3 Dealing with complaints in a timely manner**

It is central to the Corporate Customer Service Standards that customer complaints are dealt with efficiently, promptly and professionally. Therefore the Corporate Customer Complaints procedure is central to such resolution and adherence is essential.

This procedure enables the logging of complaints by department and their number, with a maximum duration of seven working days for resolution.

This indicator provides continuous analysis and measurement of customer complaints and their satisfactory and timely resolution as illustrated.

### **KBI 5 Membership**

#### **IfL/EaTF**

All our staff are members of IfL/EaTF and Directors hold or are working towards QTLS, we believe in setting high standards for our staff so we can remain at the cutting edge.

#### **membership grades**

**IfL's membership grade criteria are designed to include the diversity of teaching and training roles** found across the further education (FE) and skills sector. This diversity includes those in support roles and those who have teaching or training experience and are using this in classrooms, workshops, the community and the workplace.

The **key criteria** for the appropriate grade of membership are the **level of professional qualifications gained**, together with the **extent of teaching or training experience**.

The profiles which typify each grade are:

Member (MifL)

Experienced practitioners within further education (FE) and skills, who hold a minimum of:

- Level 5 Diploma (Diploma in Education and Training, DiEaT) or equivalent, such as a PGCE, Cert. Ed, General Professional Recognition, or
- Level 4 stage 3 FE Teacher Qualification, or
- Level 4 stage 1 or 2 FE Teacher Qualification for part-time teachers employed before September 2007.

Members are eligible to work towards Qualified Teacher Learning and Skills Status (QTLS) or Associate Teacher Learning and Skills status (ATLS), according to their qualifications and teaching role.





### **Members are entitled to use the designatory letters MifL.**

#### **Join IfL as a Member**

##### Associate (AifL)

Experienced practitioners within FE and skills, who hold a minimum of:

- Level 3/4 Certificate (Certificate in Education and Training, CiEaT) or equivalent, or
- Level 4 stage 1 or 2 FE teaching qualification for full time teachers, or
- Assessor awards.

Associates can be eligible to work towards ATLS.

#### **FSB**

The FSB is non-profit making and non-party political. The Federation of Small Businesses is the UK's largest campaigning pressure group promoting and protecting the interests of the self-employed and owners of small firms. Formed in 1974, it now has 200,000 members across 33 regions and 194 branches.

#### **Lobbying**

Our lobbying arm – led by the Westminster Press and Parliamentary office – applies pressure on MPs, Government and Whitehall and puts the FSB viewpoint over to the media. The FSB also has Press and Parliamentary Offices in Glasgow, Cardiff and Belfast to lobby the devolved assemblies. Development Managers work alongside members in our regions to further FSB influence at a regional level.

#### **Member Benefits**

In addition, Member Services is committed to delivering a wide range of high quality, good value business services to members of the FSB. These services will be subject to continuing review and will represent a positive enhancement to the benefit of membership of the Leading Business Organisation in the UK.

#### **Vision**

A community that recognises, values and adequately rewards the endeavours of those who are self-employed and small business owners within the UK.

#### **Mission Statement**

To be and remain the largest and most effective organisation promoting and protecting the interests of the self-employed and small business owners within the UK.

Principal Objectives to Achieve the Mission Statement:

- To recruit continuously at a high level
- To retain as many members as possible
- To promote the interests of members





- To protect members' business
- To publicise the benefits of self-employed and business ownership
- To identify the continuously changing needs of members

### **Strategic Account Business Plan for Educ8tions Ltd.**

Educ8tions Ltd.  
30 Elgin Avenue,  
Westminster,  
London  
W9 3QT

Tel: 01253 423710 / 0800 0096994  
Web: [www.globaleduc8tions.org](http://www.globaleduc8tions.org)  
E: [info@globaleduc8tions.org](mailto:info@globaleduc8tions.org)

Educ8tions is a Limited Company  
Registered in England: 0796633

#### **Submitted by:**

**Dr Steven Wingate - 17<sup>th</sup> January 2014**

#### **Accountant**

**First Class Business Services – 2014/2015**

#### **Director of Business Development:**

**Joe Singleton - 17<sup>th</sup> May 2014**

#### **Document Objective**

The purpose of this plan is to document information about the account in a single document and to identify opportunities for a long-term relationship with the client that will bring in continuous sales opportunities.

#### **Account Background**

Latest Accounts 31/07/2012. Category: Dormant.  
Year end: 31st July. Next Accounts due: 30/04/2014.

Our Accounts are due in April 2014, the company started to re-trade on the 1st January 2014 making Educ8tions Ltd. in affect a new Company. We will be submitting our accounts on the 30th April 2014 with our projections we hope in be in a positive position.



**\*\*Educ8tions has not begun trading until August 2014, accounts will be due in December 2014.**

## Objective

We aim to have a funded and self-funded branch to Educ8tions Ltd. this is driven from the Business Development Team.

Our objectives are to:

- Look at the opportunities for funding
- Develop a simple engagement team with tracking and KPI
- Grow the Business Development Team.

## Client Profile

Our clients are made up from a wide range of sectors such as:

- Recruitment Agencies
- Health Care Providers
- Hospitality Providers
- Customer service providers
- Education providers

## Client Business Objectives and Initiatives

Our customers have a range of objectives, a common theme is:

- Objectives about market share
- Objectives about customer satisfaction
- Objectives about employee satisfaction
- Objectives about returns to shareholders
- Objectives about cutting pollution
- Objectives about reducing waste etc.

## Client Contact List

We have an online Customer Relationship Management system (CRMs) our model is for managing our company's interactions with our current and future customers. It involves using technology to organise, automate, and synchronise sales, marketing, customer service, and technical support. Our clients contact list is only available on request with an appointment.





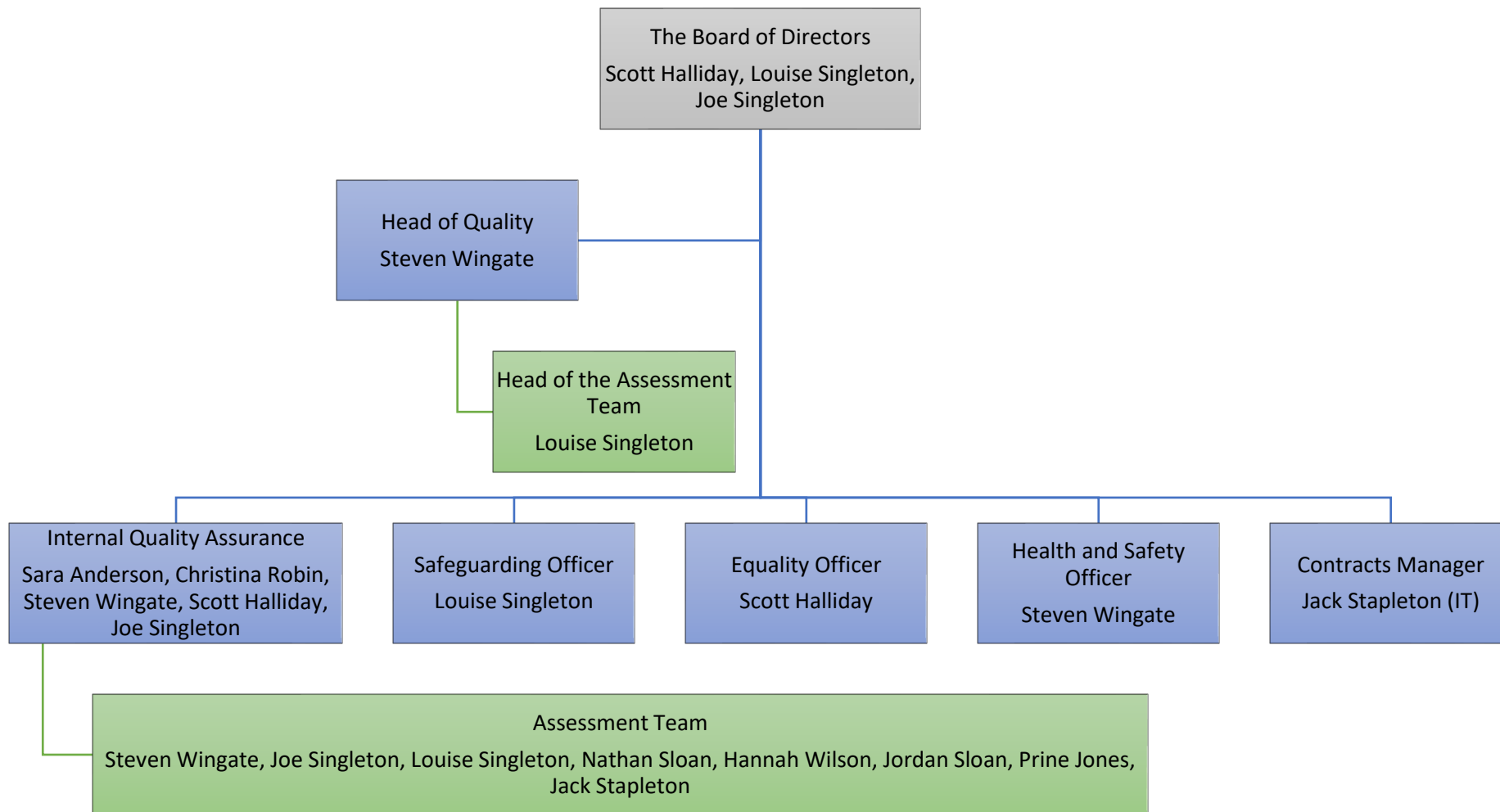


# Educ8tions Limited

Developing People for Sustainable Careers

67-68 Hatton Garden, London EC1N 8JY

Website: [www.globaleduc8tions.org](http://www.globaleduc8tions.org)



Educ8tions Ltd Registered Company No. 07699633 (T/A Global Educ8tions)







### Customer Needs

To summarise some of the benefits that our customers expect from a long term relationship with Educ8tions is:

- Start-to-end support in understanding their training and development needs.
- Clear lines of communication and reporting
- Personal approach to teaching and assessment
- Cost affective service
- Results driven
- Above national achievement levels

### Value Proposition

Our Business Development Team have also agreed to our customer service statement and values. The team understand that to drive success it starts with ethical recruitment. Each team has KPI's set within job role and targets that meet wider issues.

### Sales Opportunities

Opportunities	Person Responsible	Time Frame
UK Recruitments Agencies	Joe Singleton	Ongoing
Oversea Recruitments Agencies	Joe Singleton	Ongoing
Apprenticeships	Steven Wingate / Jack Stapleton	Ongoing
Traineeships	Steven Wingate / Jack Stapleton	Ongoing
Other Funding	Steven Wingate / Jack Stapleton	Ongoing
Private Funding	Joe Singleton / Jack Stapleton	Ongoing



### Communication Plan and Matrix

The Communication Matrix shows how we plan to communicate information to the team and audience. The Matrix also includes the frequency of communication for different types of information and method. Given the size of our team, communication is relatively simple; the main use will be e-mail and internal website.

Audience	Information	Method	Frequency	Who is Responsible
Directors	Company operations and compliance	We hold monthly meeting to understand the company and direction.	Last day of each month if applicable	The Board
BDT	Business Strategy	Online - Click meeting	Last day of each month is applicable	Joe Singleton
Assessors and IQAs	Quality and assessment	Online - Click meeting	Daily	Heads of Qualifications
Customers	Quality and planning	Online - Click meeting	Daily	Lead IQA / Contracts Manager
Employers	Quality and planning	Online - Click meeting	Daily	Lead IQA
Staff	Quality and planning	Online - Click meeting	Daily	Lead IQA

### Action Plan

Action	Person Responsible	Time Frame
Assessor action plan	Assessors	Monthly
Verifier action plan	Verifiers	Monthly
Employer action plan	Assessors	Monthly
Staff action plan	Verifiers	Monthly
Business action plan	Directors	Monthly
Director action plan	Directors	Monthly



### Required Resources

Action	Person Responsible	Time Frame
Approval: Matrix	Director of Operations	Nov 2014
BKSB	Director of Learning and Development	Jan-May 2015
Heineman book	Director of Learning and Development	Jan-May 2015



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	Jan-15	Feb-15	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Total
<b>Cash on hand (beginning of month)</b>	£459,166.31	£544,609.75	0	£628.17	£12,058.31	£33,490.35	£64,924.29	£106,360.51	£157,798.25	£219,237.89	£292,279.43	£373,722.87	£2,264,276.00

Cash Receipts													
Cash sales	£251,500.00	£279,000.00	£27,500.00	£55,000.00	£82,500.00	£110,000.00	£137,500.00	£165,000.00	£192,500.00	£220,000.00	£247,500.00	£251,500.00	£2,019,500.00
Apprenticeships 94 starts per month	£211,500.00	£235,000.00	£23,500.00	£47,000.00	£70,500.00	£94,000.00	£117,500.00	£141,000.00	£164,500.00	£188,000.00	£211,500.00	£211,500.00	£1,715,500.00
Level 7 Management (10 starts)	£10,000.00	£11,000.00	£1,000.00	£2,000.00	£3,000.00	£4,000.00	£5,000.00	£6,000.00	£7,000.00	£8,000.00	£9,000.00	£10,000.00	£76,000.00
LMC 5 (10 starts)	£10,000.00	£11,000.00	£1,000.00	£2,000.00	£3,000.00	£4,000.00	£5,000.00	£6,000.00	£7,000.00	£8,000.00	£9,000.00	£10,000.00	£76,000.00
DIEAT Level 5 (10 starts)	£10,000.00	£11,000.00	£1,000.00	£2,000.00	£3,000.00	£4,000.00	£5,000.00	£6,000.00	£7,000.00	£8,000.00	£9,000.00	£10,000.00	£76,000.00
Other (10 starts)	£10,000.00	£11,000.00	£1,000.00	£2,000.00	£3,000.00	£4,000.00	£5,000.00	£6,000.00	£7,000.00	£8,000.00	£9,000.00	£10,000.00	£76,000.00
<b>Total</b>	£251,500.00	£279,000.00	£27,500.00	£55,000.00	£82,500.00	£110,000.00	£137,500.00	£165,000.00	£192,500.00	£220,000.00	£247,500.00	£251,500.00	£2,019,500.00
Number of students Funded	846	940	94	188	282	376	470	564	658	752	846	846	-846
Number self-funded	360	400	40	80	120	160	200	240	280	320	360	360	-360
<b>TOTAL CASH RECEIPTS</b>	£719,666.31	£823,609.75	£27,500.00	£55,628.17	£94,558.31	£143,490.35	£202,424.29	£271,360.51	£350,298.25	£439,237.89	£539,779.43	£625,222.87	£4,292,775.60
<b>Total cash available</b>													

Educ8tions Ltd Registered Company No. 07699633 (T/A Global Educ8tions)



**INVESTORS  
IN PEOPLE**

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Cash Paid Out													
Advertising	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,200.00
Commissions	£42,300.00	£47,000.00	£5,500.00	£9,400.00	£14,100.00	£18,800.00	£23,500.00	£28,200.00	£32,900.00	£36,000.00	£42,300.00	£42,300.00	£342,300.00
Contract labour	£35,244.36	£39,160.40	£3,916.04	£7,832.08	£11,748.12	£15,664.16	£19,580.02	£23,496.24	£27,412.28	£31,328.32	£35,244.36	£35,244.36	£285,870.74
Employee benefit	£17,622.18	£19,580.20	£1,958.02	£3,916.04	£5,874.06	£7,832.08	£9,790.10	£11,748.12	£13,706.14	£15,664.16	£17,622.18	£17,622.18	£142,935.46
Insurance	£100.00	£100.00	£10.00	£10.00	£10.00	£10.00	£10.00	£10.00	£10.00	£10.00	£10.00	£10.00	£1,200.00
<b>Materials</b>	£1,566.00	£1,566.00	£1,566.00	£1,566.00	£1,566.00	£1,566.00	£1,566.00	£1,566.00	£1,566.00	£1,566.00	£1,566.00	£1,566.00	£18,792.00
Meals and	£200.00	£200.00	£20.00	£20.00	£200.00	£200.00	£200.00	£200.00	£200.00	£200.00	£200.00	£200.00	£2,400.00
Office expense	£200.00	£200.00	£20.00	£20.00	£200.00	£200.00	£200.00	£200.00	£200.00	£200.00	£200.00	£200.00	£2,400.00
Pension	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£12,000.00
Rent	£100.00	£100.00	£10.00	£10.00	£100.00	£100.00	£100.00	£100.00	£100.00	£100.00	£100.00	£100.00	£1,200.00
vehicles, equipment	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£12,000.00
Repairs	£500.00	£500.00	£50.00	£50.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£6,000.00
Supplies	£500.00	£500.00	£50.00	£50.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£500.00	£6,000.00
licenses	£100.00	£100.00	£10.00	£10.00	£100.00	£100.00	£100.00	£100.00	£100.00	£100.00	£100.00	£100.00	£1,200.00
Travel	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£1,000.00	£12,000.00
Utilities	£100.00	£100.00	£10.00	£10.00	£100.00	£100.00	£100.00	£100.00	£100.00	£100.00	£100.00	£100.00	£1,200.00
<b>Wages (less emp. credits)</b>	£63,524.02	£70,448.06	£8,131.77	£15,055.74	£21,979.78	£28,903.82	£35,827.66	£42,751.90	£49,675.94	£56,599.98	£63,524.02	£63,524.02	£519,946.71
<b>TOTAL CASH PAID OUT</b>	£166,056.56	£183,554.66	£26,871.83	£43,569.86	£61,679.6	£78,566.06	£96,063.76	£113,562.26	£131,060.36	£146,958.46	£166,056.56	£166,056.56	£1,379,444.70
<b>Cash on hand (end of month)</b>	£544,609.75	£640,055.09	£628.17	£12,058.31	£33,490.35	£64,924.29	£106,360.51	£157,798.25	£219,237.89	£292,279.43	£373,722.87	£459,166.31	£2,904,330.70

OTHER OPERATING DATA													
Sales volume													
Accounts receivable balance													
Bad debt balance													
Inventory on hand													
Accounts payable balance													

Educ8tions Ltd Registered Company No. 07699633 (T/A Global Educ8tions)



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Depreciation

### Five Year Projections 2014-2019

This worksheet estimates the key financial figures for a company over five years. The projections include abbreviated income and cash flow statements, and a balance sheet.

Years		2014	2015	2016	2017	2018	2019	2020
Income Statement								
Net sales								
Cost of goods sold								
Net Operating Income								
Operating expenses								
	Net Income							
Cash Flow Statement								
Beginning balance								
Cash inflow								
Cash outflow								
	Ending Cash Balance							
Balance Sheet								
Cash								
Accounts receivable								
Inventory								
Prepaid expenses								
	Total Current Assets							
Fixed assets								
	Total Assets							
Accounts payable								
Short-term notes								
Accrued & other liabilities								
	Total Current Liabilities							
Long-term debt								
Other long-term liabilities								
	Total Long-term Liabilities							
Shareholders' equity								
Total Liabilities and Equity								



<b>Balance Sheet 2014</b>			
<b>A. Datum Corporation</b>			<b>DATE</b>
Current ratio	3.38	CASH RATIO	0.24
Quick ratio	2.91	WORKING CAPITAL	
Assets		LIABILITIES	
Current assets		CURRENT LIABILITIES	
Cash and cash equivalents		Loans payable and current portion long-term debt	
Short-term investments		Accounts payable and accrued expenses	
Accounts receivable		Income taxes payable	
Inventories		Accrued retirement and profit-sharing contributions	
Deferred income taxes		TOTAL CURRENT LIABILITIES	
Prepaid expenses and other current assets			
Total current assets		OTHER LIABILITIES	
		Long-term debt	
Other assets		Accrued retirement costs	
Property, plant, and equipment at cost		Deferred income taxes	
Less accumulated depreciation		Deferred credits and other liabilities	
Property, plant, and equipment (net)		TOTAL OTHER LIABILITIES	
Long-term cash investments			
Equity investments		TOTAL LIABILITIES	
Deferred income taxes			
Other assets			
Total other assets			
TOTAL ASSETS			







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### Staff Payment fees approved by the board for 2014

Staff fees for Educ8tion 2014														
Staff Role:	Rates	JAN 2015	FEB 2015	MAR 2014	APRIL 2014	MAY 2014	JUNE 2014	JULY 2014	AUG 2014	SEP 2014	OCT 2014	NOV 2014	DEC 2014	Total 2014 /15
CEO	£15.00	£12,690.00	£14,100.00	£1,410.00	£2,820.00	£4,230.00	£5,640.00	£7,050.00	£8,460.00	£9,870.00	£11,280.00	£12,690.00	£12,690.00	£102,930.00
Assistant CEO	£11.00	£9,306.00	£10,340.00	£1,034.00	£2,068.00	£3,102.00	£4,136.00	£5,170.00	£6,204.00	£7,238.00	£8,272.00	£9,306.00	£9,306.00	£75,482.00
Director of Funding	10%													
Director of Business Development	£10.00	£8,460.00	£9,400.00	£940.00	£1,880.00	£2,820.00	£3,760.00	£4,700.00	£5,640.00	£6,580.00	£7,520.00	£8,460.00	£8,460.00	£68,620.00
Director for Learning & Development	£11.00	£9,306.00	£10,340.00	£1,034.00	£2,068.00	£3,102.00	£4,136.00	£5,170.00	£6,204.00	£7,238.00	£8,272.00	£9,306.00	£9,306.00	£75,482.00
Head of Qualifications	£10.00	£8,460.00	£9,400.00	£940.00	£1,880.00	£2,820.00	£3,760.00	£4,700.00	£5,640.00	£6,580.00	£7,520.00	£8,460.00	£8,460.00	£68,620.00
Lead Verifier	£8.33	£7,047.80	£7,830.20	£783.02	£1,566.04	£2,349.06	£3,132.08	£3,915.10	£4,698.12	£5,481.14	£6,264.16	£7,047.18	£7,047.18	£57,160.46
Verifier	£8.33	£7,047.80	£7,830.20	£783.02	£1,566.04	£2,349.06	£3,132.08	£3,915.10	£4,698.12	£5,481.14	£6,264.16	£7,047.18	£7,047.18	£57,160.46
Assessor	£41.66	£41,666.66	£41,666.66	£41,666.66	£41,666.66	£41,666.66	£41,666.66	£41,666.66	£41,666.66	£41,666.66	£41,666.66	£41,666.66	£41,666.66	£499,920.00
Office Support	£14.00	£1,166.00	£1,166.00	£1,166.00	£1,166.00	£1,166.00	£1,166.00	£1,166.00	£1,166.00	£1,166.00	£1,166.00	£1,166.00	£1,166.00	£13,992.00
Course Advisors	5%													
Business Development Manager	10%													
<b>Total</b>		<b>£63,524.02</b>	<b>£70,448.06</b>	<b>£8,317.70</b>	<b>£15,055.74</b>	<b>£21,979.78</b>	<b>£28,903.82</b>	<b>£35,827.66</b>	<b>£42,751.90</b>	<b>£49,675.94</b>	<b>£56,599.98</b>	<b>£63,524.02</b>	<b>£63,524.02</b>	<b>£519,946.71</b>

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