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A Educational Psychologist's

Essential **planning**

guide for **BOTH**

the Academic and Financial Year, to

avoid *burnout*

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As an Educational Psychologist, you're effectively working across

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**The Financial Year runs from April to April*

The Academic Year runs from September to July

Calendars

*financial and academic**

Blending both is essential for sustainability, income stability, and avoiding burnout.



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Avoid showers of stress and ensure you bloom by beginning your planning in

April-July



It is probably best to begin your planning in the new financial year, as you will have a clear understanding of your budgets and finances available for the rest of the year. Look at last year's spending to track patterns and plan accordingly. To avoid disasters such as an April showers' worth of referrals raining in (especially when you don't have capacity), map out the year ahead.

I would... Assess, Plan, Do and Review
(Yes, APDR can apply to us too!)

Check in with my accountant or finance teams to assess and review **last year's spending** and **plan my Self-Assessment Tax return early** - don't wait until January! **By July**, I would ensure I have made all **payments on my tax account** (these are advance, twice-yearly instalments towards your HMRC Self Assessment tax bill). *Please note this is NOT financial advice, just a guide. Consult your accountant.*

Renew service-user agreements and contracts for the new year. As it's April, clients will also have a better understanding of how much they can invest in your services too.

Plan at least 2 CPD activities per calendar month and plot them in the diary. You will likely do more than this, but having 24 pre-scheduled activities is a good way to make sure you are keeping up with things regularly and that CPD doesn't go to the back burner. **To avoid stress, don't let it all pile up when other deadlines are due.**

Do deliver reports and outstanding commitments to service users before the end of the academic year (Summer Term). **Don't try to squeeze in new referrals** - unless necessary. Complete handovers for new starters or leavers. In July, **celebrate your hardworking trainees and new graduates.**

School's out for Summer.
A renaissance, relaxation,
and yes - a little bit of reading!

August- September

MESSAGES

now

Take time for your well-being.
Refuel and replenish.

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MESSAGES

now

Travel and explore. Spend time with loved ones. Holidays can be cheaper in early September and the number of incoming referrals can be low.

MESSAGES

now

Engage in low-level CPD of your interests. Read a book or magazine or listen to a podcast. If you have the budget, attend a conference in another country.

MESSAGES

now

It's a great time for catching up on admin whilst client contact is low.



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Oct-Dec

Referrals and casework usually increase

Schools have had time to settle in and identify needs. This is a good time to **begin frontloading work** as after the Christmas break, you have just one term to deliver your services within the financial year.

Doctoral applications open

You may be inundated with requests from prospective applicants. If you can make capacity to support them, definitely do.



New Year, Nope! Same me

January-April



Still checking finances and filing taxes



Still delivering services



Licensing and membership renewals - HCPC, BPS etc.

During this period, you may feel the pressure to meet all deadlines before the new financial year. You are doing more of the same as last year. However, if there are excesses in the budget, it may be a good time to decide if you will use those up or carry those savings over to the new year.

Check you are meeting your membership and licensing renewal timelines. For HCPC this can be between March and May every 2 years for Practitioner Psychologists. Check in with your body for the official and recent dates.

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One last thing...

Corporation Tax & Accounting Periods

These dates vary depending on when you registered or when you decided they were. Find out what month your accounting periods run from and speak with your accountant early to go over your book keeping, accounts, expenses and corporation tax estimates.

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