

Schools Finance

Training & Development



Governors

2015-16

Welcome!

The Governor Finance Programme has been specifically designed to provide new and existing Governors with the financial skills and knowledge needed to effectively lead strategic financial management within schools.

Below, you will find a list of all the courses in the programme. Clicking on a page number will take you to detailed course information.

Core Skills

The courses in this section relate to the essential finance skills required by all School Governors.

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Further Learning

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The courses in this section relate to further skills required by Finance Committee members and Chairs of Governors. We would recommend that these courses are completed within two years of starting or as refreshers.

Information about the link between Training and the Finance RAG Matrix can be found on [Page 10](#). Venue information can be found on [Page 11](#).

Introduction to School Finance

This eLearning course provides an overview of school finance from funding through to budgeting and financial systems used within Norfolk schools. A great starting point for those that are new to school finances.

Content

- Roles & Responsibilities
- Setting the Budget
- Monitoring the Budget
- Protecting Public Money

Course Bookings

For further information and details on how to book or access courses please visit our website:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>

There is no charge for this course if your school has purchased a Finance Support Package for 2015-16.

Suitability

This course is essential for all new Governors as a pre-requisite for further training.

Format

1.5 hours eLearning module with additional supporting course material.

Course Dates

You will need to log in to Learning Hub to access this course.



Schools Financial Value Standard

The Schools Financial Value Standard is designed to assist schools in managing their finances and to give assurance that they have secure financial management systems in place. In this course we will be examining the SVFS Questionnaire to identify what evidence can be provided to give assurance that the standard is being met.

Content

- The SFVS Questionnaire
- Governing Body and School Staff
- Setting the Budget
- Value for Money
- Protecting Public Money
- Timescales for Completion
- Role of the Local Authority

Course Bookings

For further information and details on how to book or access courses please visit our website:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>

There is no charge for this course if your school has purchased a Finance Support Package for 2015-16.

Suitability

This course is suitable for all new Governors and existing Governors that require a refresher.

Format

3 hour tutor-led course

Course Dates

The course is scheduled for the following dates and times:

07 May 15	Norwich PDC	18:00 - 21:00
22 Sep 15	Kings Lynn PDC	09:00 - 12:00
16 Nov 15	Norwich PDC	09:00 - 12:00
03 Dec 15	Norwich PDC	18:00 - 21:00
18 Jan 16	Norwich PDC	09:00 - 12:00
28 Jan 16	Kings Lynn PDC	18:00 - 21:00

The School Budget

This course is all about the School Budget and how schools can be assured that a balanced budget, that links to the school 's strategic priorities, is set and monitored throughout the year. This course is designed and built around the requirements of Section B (Setting The Budget) of the Schools Financial Value Standard.

Content

- Strategic Budget Planning
- Setting the 3 Year Budget
- Budget Commentary
- Effective Budget Monitoring
- The Budget Cycle
- Outturn Variance Analysis

Course Bookings

For further information and details on how to book or access courses please visit our website:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>

There is no charge for this course if your school has purchased a Finance Support Package for 2015-16.

Suitability

This course is ideal for new and existing Governors with responsibility for the school budget.

Format

3 hour tutor-led course

Course Dates

The course is scheduled for the following dates and times:

05 Jun 15	Norwich PDC	09:00 - 12:00
10 Sep 15	Norwich PDC	18:00 - 21:00
05 Nov 15	Norwich PDC	18:00 - 21:00
26 Nov 15	Kings Lynn PDC	18:00 - 21:00
02 Feb 16	Kings Lynn PDC	09:00 - 12:00
01 Mar 16	Norwich PDC	09:00 - 12:00

Value For Money

This course is about how schools can obtain Best Value with the resources available and follow rules, regulations and best practice relating to procurement. This course is designed and built around the requirements of Section C (Value For Money) of the Schools Financial Value Standard.

Content

- Benchmarking
- Purchasing Requirements
- Procurement Cycle
- Importance of Seeking Advice
- Analysis of Balances
- Collaboration

Course Bookings

For further information and details on how to book or access courses please visit our website:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>

There is no charge for this course if your school has purchased a Finance Support Package for 2015-16.

Suitability

This course is ideal for new and existing Governors with responsibility for the school budget.

Format

3 hour tutor-led course

Course Dates

The course is scheduled for the following dates and times:

09 Jul 15	Norwich PDC	09:00 - 12:00
10 Nov 15	Norwich PDC	18:00 - 21:00
03 Mar 16	Norwich PDC	09:00 - 12:00
08 Mar 16	Kings Lynn PDC	18:00 - 21:00

Protecting Public Money

This course is about how Governors can fulfil their formal responsibility for the protection of public money through the implementation and application of internal controls and self-assessment processes. This course is designed and built around the requirements of Section D (Protecting Public Money) of the Schools Financial Value Standard.

Content

- Frauds and Scams
- NCC Anti-fraud Strategy
- Self-Assessment of Controls
- Whistleblowing Policy
- Auditing Requirements
- Business Continuity Plans

Course Bookings

For further information and details on how to book or access courses please visit our website:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>

There is no charge for this course if your school has purchased a Finance Support Package for 2015-16.

Suitability

This course is ideal for new and existing Governors with responsibility for the school budget.

Format

3 hour tutor-led course

Course Dates

The course is scheduled for the following dates and times:

16 Jun 15	Norwich PDC	18:00 - 21:00
18 Sep 15	Norwich PDC	09:00 - 12:00
08 Dec 15	Kings Lynn PDC	18:00 - 21:00
11 Jan 16	Norwich PDC	09:00 - 12:00

Cluster Finance

This course provides guidance on how to effectively manage Cluster Funds. It includes practical advice on financial procedures, budgets, effective monitoring processes and key financial controls.

Content

- Cluster Procedures
- Roles & Responsibilities
- Cluster Funding
- Cluster Budget
- Monitoring & Evaluating Spend
- Financial Controls

Course Bookings

For further information and details on how to book or access courses please visit our website:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>

There is no charge for this course if your school has purchased a Finance Support Package for 2015-16.

Suitability

This course is ideal for new and existing Governors with responsibility for the school and/or cluster budget.

Format

3 hour tutor-led course

Course Dates

The course is scheduled for the following dates and times:

30 Jun 15	Norwich PDC	09:00 - 12:00
16 Jul 15	Kings Lynn PDC	18:00 - 21:00
20 Oct 15	Norwich PDC	18:00 - 21:00
21 Jan 16	Norwich PDC	09:00 - 12:00

Capital Funding

This eLearning course focuses on the capital funding allocation. It includes information on the rules around what it can be spent on, the process for applying to spend capital money and how it can be monitored.

Content

- Capital Allocations
- Premises Development Plans
- DFC Application Form
- Monitoring Capital Funds

Course Bookings

For further information and details on how to book or access courses please visit our website:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>

There is no charge for this course if your school has purchased a Finance Support Package for 2015-16.

Suitability

This course is ideal for new and existing Governors with responsibility for the school budget.

It is not suitable for VA Schools.

Format

1 hour eLearning module with additional supporting course material.

Course Dates

This course is accessed through Learning Hub.



Introduction to Star Accounts

The aim of this eLearning course is to provide an overview of the basic day-to-day functionality of Star Accounts.

Content

- Access and navigation
- Raising orders
- Processing payments
- Recording and banking income
- Downloads
- Bank Reconciliation
- Period End
- Monthly reports

Course Bookings

For further information and details on how to book or access courses please visit our website:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>

There is no charge for this course if your school has purchased a Finance Support Package for 2015-16.

Suitability

This course is suitable for Governors that require an overview of how the accounting system works.

Format

1 hour eLearning module with additional supporting course material.

Course Dates

This course is accessed through Learning Hub.



Purchasing Cards - Approvers

An eLearning course to provide Purchasing Card approvers with the knowledge required to effectively check purchases made by cardholders and approve transactions.

Content

- Purchasing Card procedures
- Checking VAT receipts
- Checking Subjective Codes
- Approving Transactions
- Barclaycard Spend Management

Course Bookings

For further information and details on how to book or access courses please visit our website:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>

There is no charge for this course if your school has purchased a Finance Support Package for 2015-16.

Suitability

This course is essential for any Governors registered as a Purchasing Card approver.

Format

1 hour eLearning module with additional supporting course material.

Course Dates

This course is accessed through Learning Hub.

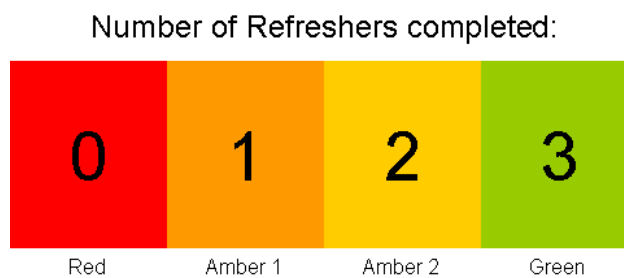


RAG Training Link

The Finance RAG (Red / Amber / Green) Matrix is an early warning system which helps the local authority to assess financial risk in schools to ensure that appropriate support is made available to Headteachers and school Governors as required. It is prepared termly by Finance Support Officers and contains a series of financial management criteria. In financial year 2013-14, financial training for Governors, Headteachers and Finance Staff was added to this list of criteria.

Governor Training Requirements

For the RAG Matrix, the Governing Body from the school will be expected to keep their finance knowledge and skills updated by completing a number of refreshers in a financial year. The number completed will determine the RAG rating:



It is the Governing Body as a whole that is rated rather than individual Governors allowing the flexibility to spread the training amongst Governors based on needs.

All of the courses within this brochure count towards the RAG Matrix but there are additional options available. Governors can also attend any of the following as refreshers:

- Any course listed in the Headteacher and Finance Staff brochures
- Budget Workshop
- Attendance at a Budget Visit
- Fair Funding Consultation
- Other Ad-Hoc Finance Briefing / Event held by the Schools Finance Team

To help the Governing Body determine Training Needs and plan to keep updated, the finance courses have been split between Core Skills and Further Learning.

Training Venues

All of our scheduled tutor-led courses are delivered at the following venues:



Professional Development Centre

Woodside Road, Norwich, NR7 9QL



West Norfolk Professional Development Centre

Kilham 's Way, Kings Lynn, PE30 2HU

Ad-hoc sessions can be arranged for your school or cluster for any of the tutor-led courses listed in this Brochure. Courses are charged at £416 per 3-hour session for up to 50 delegates. To arrange a school or cluster session, please contact us on 01603 224271 or email csfinancetraining@norfolk.gov.uk.

Electronic Handouts

Our course handouts have now gone electronic! We will be using tablet devices to access course handouts during our tutor-led sessions through Learning Hub. Full instructions will be provided at the session and you will continue to have access to the electronic handouts after the course.

Bookings and Information

You will find instructions on how to book yourself on a course on our website along with lots of useful information about our venues, courses and further training opportunities that are available:

<https://sites.google.com/a/nsix.org.uk/schools-finance-training/>