

# Schools Finance

Training & Development



## Finance Staff 2016-17

# Welcome!

This training programme has been specifically designed to provide new and existing school Finance Staff and Business Managers with the financial skills and knowledge needed to effectively operate and manage finances within schools.

Over the next 2 pages 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 operational skills required by all finance staff working within schools. They cover the core functionality of Star Accounts as well as related financial procedures.

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The courses in this section are aligned to skills that **may** be required by finance staff depending on their responsibilities at the school. For example, your school may have decided to purchase the Star Accounts Asset Register, in which case, a bespoke course is available to learn how to use it.

Each course includes practical training on using the required software as well as full guidance on accompanying procedures.

## Budgeting Skills

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The courses in this section are relevant to Finance Staff and Business Managers that have responsibility for the school budget.

They include plenty of practical exercises to help you understand and apply key financial management skills.

## Refreshers

The courses in this section are specifically designed as refreshers for important areas of finance that are often subject to changes in legislation or procedure.

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Information about the link between Training and the Finance RAG Matrix for new and existing finance staff can be found on [Page 28](#). Booking and venue information can be found on [Page 30](#).



All courses of the Finance Staff Training Programme are provided at no additional charge if your school has purchased a Finance Support Package for 2016-17.

# New Finance Staff Visit

During this 3 hour visit, the school 's Finance Support Officer will provide an overview of the essential elements of school finances and explain other training opportunities that are available.

## Content

- Roles and responsibilities
- School Budgets
- Financial procedures
- Sources of information
- New Finance Staff Questionnaire
- Finance training requirements

## Course Bookings

Your school 's Finance Support Officer will contact you to arrange a suitable time to arrange the visit.

In the meantime, you will find lots of useful information about our venues, courses and further training opportunities that are available on our website:

<http://www.eficts.norfolk.gov.uk/finance/training/brochure.asp>

## Suitability

This course is available for all new school finance staff as part of the Finance Support Package purchased by the school.

## Format

3 hour school visit.

## Course Dates

The session will be booked on an individual basis by your school 's Finance Support Officer.

# 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

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the ' School Finance Learners - New Account ' button.

## Suitability

This course is essential for all new Governors, Headteachers and Finance Staff 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.



# 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

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the 'School Finance Learners - New Account' button.

## Suitability

This course is suitable for new Finance Staff as a pre-requisite to further training, and Headteachers and Governors that require an overview of the accounting system.

## Format

1.5 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Purchasing & Expenditure

This course focuses on all aspects of recording expenditure within schools. It provides more detailed training on purchasing regulations, raising orders, accounting for VAT and recording individual transactions as well as how to fix common problems that occur.

## Content

- Purchasing regulations
- Raising orders
- Reviewing commitments
- Checking and paying invoices
- Multiple coding transactions
- Future year payments
- VAT on expenditure transactions
- Reversing transactions
- Key financial controls

## Course Bookings

This course must be booked on SLA

Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

Finance staff with responsibility for raising orders and recording expenditure through Star Accounts.

## Format

1 day tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

13th Sep 16	Norwich PDC	09:30 - 16:00
11th Oct 16	Kings Lynn PDC	09:30 - 16:00
24th Jan 17	Norwich PDC	09:30 - 16:00



# Income & Banking

This course focuses on recording income within Star Accounts. It provides more detailed training on raising standard invoices, accounting for VAT, chasing for bad debts and recording individual transactions as well as how to fix common problems that occur.

## Content

- Raising standard invoices
- Processing income transactions
- Accounting for VAT on income transactions
- Problem solving
- Banking procedures
- Key financial controls
- Bad debt procedures

## Course Bookings

This course must be booked on SLA

Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

Finance staff with responsibility for raising invoices and recording income through Star Accounts.

## Format

1 day tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

14th Sep 16	Norwich PDC	09:30 - 16:00
12th Oct 16	Kings Lynn PDC	09:30 - 16:00
25th Jan 17	Norwich PDC	09:30 - 16:00



# Month End

The aim of this course is to ensure that delegates are able to effectively complete a bank reconciliation and review the accounts prior to moving into the next month. It provides plenty of guidance on how to check records and fix common problems experienced at month end.

## Content

- Processing downloads
- Processing a bank reconciliation
- Problem solving at month end
- Checking Month End Reports
- Monthly Monitoring Reports
- Reviewing commitment records
- Month End Errors Report

## Course Bookings

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

Finance staff with responsibility for processing and checking downloads and running Period End on Star Accounts.

## Format

3 hour tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

15th Sep 16	Norwich PDC	09:30 - 12:30
13th Oct 16	Kings Lynn PDC	09:30 - 12:30
26th Jan 17	Norwich PDC	09:30 - 12:30

# Year End

This course provides practical based training on what to expect at Year End and how to undertake the tasks involved.

## Content

- Year End Checklist
- Reviewing commitments
- Accruals and prepayments
- Running year end
- Processing downloads
- Tidying up your accounts
- Key Timescales

## Course Bookings

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

This course is essential for a Finance Staff with responsibility for processing Year End on Star Accounts.

## Format

3 hour tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

27th Feb 17	Norwich PDC	09:30 - 12:30
27th Feb 17	Norwich PDC	13:00 - 16:00
28th Feb 17	Kings Lynn PDC	09:30 - 12:30
28th Feb 17	Kings Lynn PDC	13:00 - 16:00
1st Mar 17	Norwich PDC	09:30 - 12:30
1st Mar 17	Norwich PDC	13:00 -16:00

# Dinner Monies Database

Step-by-step training on how to use the Dinner Monies Database from setting up the software through to recording meals eaten, payments received and banking.

## Content

- Setting up the database
- Entering school meals data
- Recording cash received
- Entering banking details
- Weekly roll forward
- Printing weekly reports
- Creditor and debtor letters

## Course Bookings

This course must be booked on SLA

Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

Anyone that uses or would like to use the Dinner Monies Database to assist with dinner money collection.

## Format

3 hour tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

28th Jun 16	Kings Lynn PDC	09:30 -12:30
3rd Nov 16	Norwich PDC	09:30 - 12:30
8th Mar 17	Norwich PDC	09:30 - 12:30

# School Fund

The aim of this eLearning course is to ensure that delegates are aware of best practice when accounting for the school fund. It includes interactive instruction on how to make best use of Star Accounts to administer the school fund.

## Content

- Appropriate expenditure
- Roles and responsibilities
- Income and expenditure
- Month end reconciliation
- School fund audit requirements
- Year end Balance Sheet
- Star Accounts School Fund

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the ' School Finance Learners - New Account ' button.

## Suitability

Staff responsible for the administration of the school fund.

## Format

1.5 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Administering Lettings

The aim of this eLearning course is provide delegates with the knowledge to effectively administer and manage the letting of school premises along with using the Debtors functionality with Star Accounts to raise invoices for lettings.

## Content

- Activate the Debtors function
- Set up customer and facility records
- Register invoice payments
- Process refunds
- Run a variety of reports to help manage outstanding invoices
- Run a Lettings Report

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the ' School Finance Learners - New Account ' button.

## Suitability

This course is suitable for finance staff that have responsibility for administering the letting of school premises.

## Format

2 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Sickness Insurance

An eLearning module to provide delegates with knowledge required to effectively use the Sickness Insurance Database to process monthly returns.

## Content

- NCC Sickness Insurance Scheme
- Sickness Insurance Database
- Importing Staff details
- Entering Contract details
- Registering claims
- Processing monthly returns

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the 'School Finance Learners - New Account' button.

## Suitability

This course is suitable for Finance staff with responsibility for completing Sickness Insurance returns to Norfolk County Council.

## Format

1 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Petty Cash

An eLearning module to provide delegates with knowledge required to effectively control Petty Cash using Star Accounts.

## Content

- School Finance Policy
- Petty Cash expenditure
- Checking receipts
- Accounting for VAT
- Adding Petty Cash transactions
- Reconciling Petty Cash
- Topping up Petty Cash

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the ' School Finance Learners - New Account ' button.

## Suitability

This course is suitable for Finance staff with responsibility for maintaining a Petty Cash tin and updating Star Accounts.

## Format

1 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.





# Trading Accounts

The aim of this eLearning course is to provide you with the skills and knowledge to accurately produce a Trading Account for items bought and resold to pupils.

## Content

- Roles and Responsibilities
- FIFO Method of Stock Valuation
- Using the Stock Valuation Table
- Constructing the Trading Account
- Authorisation

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the 'School Finance Learners - New Account' button.

## Suitability

This course is suitable for Finance staff with responsibility for creating a Trading Account for items bought and resold to pupils.

## Format

1 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Activity Accounts

This eLearning course aims to provide the skills and knowledge required to construct an Activity Account for a school trip.

## Content

- Roles & Responsibilities
- Trip Income and Expenditure
- Creating the Activity Account
- Authorisation
- Reconciliation and Audit

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the 'School Finance Learners - New Account' button.

## Suitability

This course is suitable for Finance staff with responsibility for creating Activity Accounts.

## Format

1 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Purchasing Cards

The aim of this eLearning course is to provide delegates with the knowledge required to effectively deal with the administration of Purchasing Cards using Barclaycard Spend Management and Star Accounts.

## Content

- Purchasing Card procedures
- Cardholder processes
- Approver processes
- Barclaycard Spend Management
- Checking downloaded costs
- Processing on Star Accounts

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the ' School Finance Learners - New Account ' button.

## Suitability

Finance staff with responsibility for the administration of Purchasing Cards within the school.

## Format

1 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Asset Register

An eLearning module to provide instruction on using the Asset Register module in Star Accounts.

## Content

- Setting up the Asset Register
- Entering Assets
- Maintenance Records
- Safety Check Records
- Registering Loans and Sales
- Disposals
- Asset Reports

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the ' School Finance Learners - New Account ' button.

## Suitability

This course is suitable for Headteachers and Finance Staff with responsibility for the management and administration of the Star Accounts Asset Register.

## Format

1.5 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Assisted Bank Reconciliation

The aim of this bite-sized eLearning course is to provide delegates with the knowledge to use the Assisted Bank Reconciliation function within Star Accounts.

## Content

- Logging into Barclays.NET
- Producing an Account Statement covering the reconciliation period
- Running the Assisted Bank Reconciliation function
- Investigating unmatched transactions

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the ' School Finance Learners - New Account ' button.

## Suitability

This course is suitable for finance staff that have responsibility for conducting the bank reconciliation in Star Accounts.

**Please note: This course is only suitable for schools that bank with Barclays.**

## Format

20 minute bite-sized eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Revenue Funding

In this eLearning course you will learn about the factors used within Norfolk's funding formula and how additional grants are calculated and received at the school.

## Content

- Look up your school's funding
- Funding Factors and criteria
- SEN Funding
- Pupil Premium
- Universal Infant Free School Meals
- Primary PE & Sports Grant

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the 'School Finance Learners - New Account' button.

## Suitability

This course is ideal for Headteachers, Governors, Business Managers and Finance Staff who have responsibility for the school budget.

## Format

1 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.





# Building Your Budget

This course focuses on the elements that make up a school budget and where the information comes from. The course also includes the use of the Budget Planner software.

## Content

- Information required
- Calculating a starting point
- Calculating staffing costs
- Linking the SIDP to the budget
- Calculating future year budgets
- Budget Planner Software
- Balancing the budget

## Course Bookings

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

This course is ideal for Headteachers, Business Managers and Finance Staff who have responsibility for the school budget.

## Format

1 day tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

5th Jul 16	Kings Lynn PDC	09:30 - 16:00
18th Oct 16	Norwich PDC	09:30 - 16:00
10th Jan 17	Norwich PDC	09:30 - 16:00



# Keeping Control of Your Finances

This course will give delegates a practical understanding of how to monitor and investigate school budgets using reports generated from Star Accounts.

## Content

- Budget monitoring responsibilities
- Budget Cycle
- Importance of regular monitoring
- Star Accounts reports
- Setting up monitoring processes
- Investigating variances

## Course Bookings

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

This course is ideal for Headteachers and Finance Staff who have responsibility for the school budget.

## Format

3 hour tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

19th May 16	Norwich PDC	09:00 - 12:00
20th Sep 16	Norwich PDC	09:00 - 12:00
1st Dec 16	Kings Lynn PDC	09:00 - 12:00
6th Mar 17	Norwich PDC	09:00 - 12:00

# Revising Your Budget

This course will give delegates the skills and knowledge needed to complete a Budget Revision using the Budget Planner Software.

## Content

- Why budgets are revised
- The Budget Cycle
- Revising the Budget
- Monitoring information
- Reviewing SIDP spend
- Budget Planner Software

## Course Bookings

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

This course is ideal for Headteachers and Finance Staff who have responsibility for the school budget.

## Format

3 hour tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

12th Jul 16	Kings Lynn PDC	09:00 - 12:00
8th Nov 16	Norwich PDC	09:00 - 12:00
18th Jan 17	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

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the ' School Finance Learners - New Account ' button.

**Please note: This eLearning course is not suitable for VA Schools.**

## Suitability

This course is ideal for new and existing Headteachers, Finance Staff and Governors with responsibility for the school budget.

## Format

1 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Staff Monitoring

This course is all about the Staff Monitoring Reports held within Star Accounts and the link to the Budget.

## Content

- Staffing Forecasts
- Staff Budget profiles
- Staff records in Star Accounts
- Staff Monitoring Reports
- Solving common problems

## Course Bookings

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

This course is ideal for Headteachers and Finance Staff with responsibility for the school budget.

## Format

3 hour tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

17th May 16	Norwich PDC	09:30 - 12:30
15th Nov 16	Norwich PDC	09:30 - 12:30
16th Dec 16	Kings Lynn PDC	09:30 - 12:30
23rd Feb 17	Norwich PDC	09:30 - 12:30

# 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

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

This course is ideal for Governors, Headteachers and Finance Staff that want to know more about the management of cluster finances.

## Format

3 hour tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

5th Dec 16	Kings Lynn PDC	09:00 - 12:00
12th Jan 17	Norwich PDC	09:00 - 12:00

# 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 SFVS 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

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

This course is suitable for Governors, Headteachers and Finance Staff with responsibility for completing the SFVS questionnaire.

## Format

3 hour tutor-led course

## Course Dates

The course is scheduled for the following dates and times:

24th May 16	Norwich PDC	09:00 - 12:00
6th Oct 16	Norwich PDC	09:00 - 12:00
10th Nov 16	Kings Lynn PDC	09:00 - 12:00
6th Feb 17	Norwich PDC	09:00 - 12:00

# Key Financial Controls

Designed in conjunction with Norfolk Audit Service, this course covers the importance of financial controls in order to minimise the risk of financial irregularities and fraud.

## Content

- Frauds and scams
- Identifying control weaknesses
- Key financial controls
- Assessing internal controls
- Norfolk Audit Service
- The NCC Whistleblowing Policy

## Course Bookings

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

This course is ideal for Finance Staff that have responsibility for the management and/or operation of finances.

## Format

3 hour tutor-led course.

## Course Dates

The course is scheduled for the following dates and times:

22nd Sep 16	Norwich PDC	09:30 - 12:30
2nd Feb 17	Norwich PDC	09:30 - 12:30
22nd Feb 17	Kings Lynn PDC	09:30 - 12:30



# VAT For Schools

This course aims to ensure that staff responsible for school financial records are accounting for VAT correctly. Delegates will have the opportunity to bring along their own specific VAT questions to be answered by the NCC Tax Accountant.

## Content

- The basics of VAT
- VAT categories
- VAT receipts and invoices
- Using the VAT manual
- Further help and advice
- Open surgery with the VAT expert

## Course Bookings

This course must be booked on SLA Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

This course is for existing Finance Staff that are responsible for maintaining school financial records and operating Star Accounts.

## Format

3 hour tutor-led course.

## Course Dates

The course is scheduled for the following dates and times:

27th Sep 16	Norwich PDC	09:30 - 12:30
22nd Nov 16	Kings Lynn PDC	09:30 - 12:30
1st Feb 17	Norwich PDC	09:30 - 12:30

# Star Refresher

This course provides a refresher for existing Star Accounts users. It offers a more detailed understanding of the software with plenty of useful hints, tips and problem solving activities.

## Content

- Core functionality refresher
- Extra functionality of Star
- New developments
- Department Codes and Groups
- Resolving common problems
- Cheque / Remittance printing
- Star Accounts reporting suite
- Frequently Asked Questions
- And Lots more....!

## Course Bookings

This course must be booked on SLA

Online: <http://s4s.norfolk.gov.uk>

If you do not have an SLA Online account then please speak to your school 's SLA Online co-ordinator.

There is no charge for this course if your school has purchased a Finance Support Package for 2016-17.

## Suitability

Ideal for existing Finance Staff currently using Star Accounts who would like to learn more about its functionality and how to resolve common problems.

## Format

1 Day tutor-led course.

## Course Dates

The course is scheduled for the following dates and times:

9th Jun 16	Norwich PDC	09:30 - 16:00
20th Oct 16	Norwich PDC	09:30 - 16:00
19th Jan 17	Norwich PDC	09:30 - 16:00
9th Feb 17	Kings Lynn PDC	09:30 - 16:00

# Journals

This eLearning course aims to provide the skills and knowledge required to process Journals in Star Accounts.

## Content

- Processing Journals
- Allocating Department Codes
- Allocating Staff Codes
- Journal Templates
- Journal Import Templates
- NCC Internal Journal Requests

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the ' School Finance Learners - New Account ' button.

## Suitability

This course is ideal for existing Finance Staff that process journals in Star Accounts.

## Format

1 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



# Department Codes

This eLearning course provides detailed instruction on setting up and using Department Codes to help monitor specific parts of the school budget.

## Content

- Benefits of Department Codes
- Setting up Department Codes
- Recording Activities and Trips
- Amending Codes
- Department Grouping
- Devolved Budgets
- Departmental Reporting

## Learning Hub

All of our eLearning courses are accessed via Learning Hub:

<http://norfolk.learningpool.com/>

When visiting Learning Hub for the first time you will need to complete a short self-registration form to set yourself up with a User ID and Password. To do this, click on the 'School Finance Learners - New Account' button.

## Suitability

This course is ideal for Headteachers and Finance Staff with responsibility for setting and monitoring the school budget.

## Format

1 hour eLearning module with additional supporting course material.

## Course Dates

This course is accessed through Learning Hub.



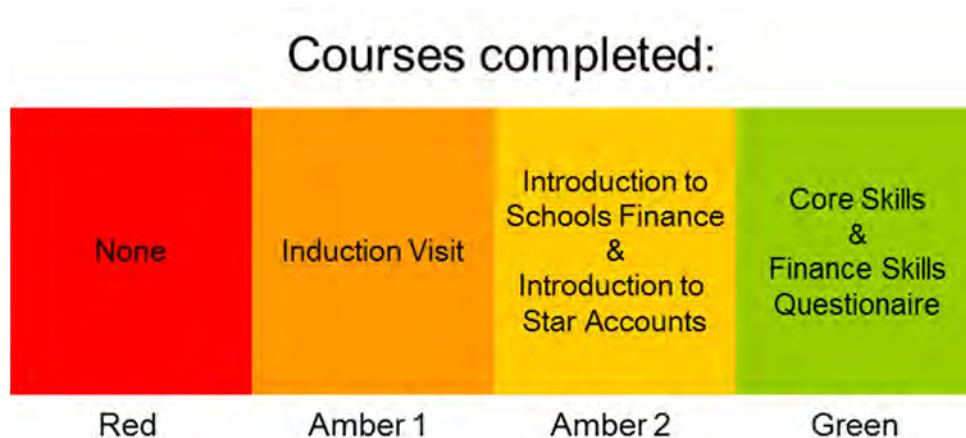
# RAG Training Link

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.

## New Finance Staff

It is important that new finance staff are able to quickly gain the skills and knowledge needed to operate the school finances. A new un-trained finance officer can pose a significant risk to the integrity of the school financial information used for budget monitoring and decision-making.

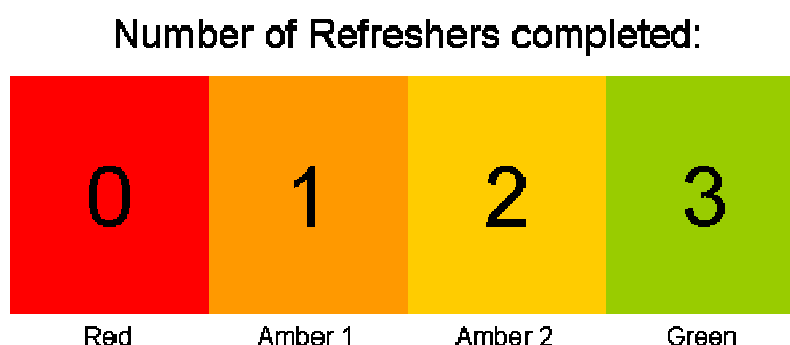
The Training section of the RAG therefore includes a progressive training process to ensure that finance staff gain the required skills and knowledge in a timely manner. The requirements for 2016-17 are:



To support this process, each new member of staff will be issued with a personalised Finance Training Plan, based on the skills undertaken at the school. This is designed to help make the most training opportunities available, provide a clear pathway for gaining the required financial skills, and provide support in applying those skills at the school.

# Existing Finance Staff

For the RAG Matrix, existing finance staff will be expected to keep updated on finance knowledge and skills by completing a defined number of refreshers in a financial year. The number completed will determine the RAG rating:



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

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

# 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](mailto: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:

<http://www.eficts.norfolk.gov.uk/finance/training/brochure.asp>