

Financial Training

**Norfolk LA Maintained Schools
Finance Staff Training 2018-19**



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 3 pages you will find a list of all the courses followed by the detailed course pages.

New to Finance	Page
New Finance Staff Induction	6
Introduction to School Finance (e)	7
Introduction to Star Accounts (e)	8
Star Accounts Foundation (t)	9
Skills Questionnaire (e)	10
Finance Overview	Page
Revenue Funding (e)	11
Capital Funding (e)	12
Schools Financial Value Standard (e)	13
Budgeting	Page
Staff Monitoring (t)	14
Department Codes (e)	15
Introduction to LA Budget Planner Software (t)	16

Format

e- eLearning

t- Tutor Led

Star Accounts	Page
Star Accounts Year End (t)	17
Administering Lettings (e)	18
Petty Cash (e)	19
Trading Accounts (e)	20
Activity Accounts (e)	21
Star Asset Register (e)	22
Assisted Bank Reconciliation (e)	23
Electronic Payments (BACS) (e)	24
Star Accounts Refresher (t)	25
Journals (e)	26

Supporting Software	Page
Dinner Monies Database (t)	27
School Fund (e)	28
Sickness Insurance (e)	29
Purchasing Cards (e)	30

Format

e- eLearning

t- Tutor Led

Protecting Public Money	Page
Fraud Awareness (e)	31
Fraud Prevention and Detection (e)	32
Fighting Financial Fraud (t)	33

Thinking of becoming an Academy?	Page
Introduction to Academy Finance (t)	34
Academy Financial Statements (t)	35

Further Learning	Page
Finance in Education Qualifications	36
Bookkeeping in Educational Establishments	37
VAT in Educational Establishments	38
Costing in Educational Establishments	39

Format

e– eLearning

t– Tutor Led

Booking information can be found on Page 5 and further information about the link between Training and the Finance RAG Matrix for new and existing Finance Staff can be found on Pages 40 & 41.

All courses, support material and training plans are provided at no additional cost if your school has purchased a Finance Support Package for the current year **(unless otherwise stated)**.

Our finance courses can be booked and accessed in the following ways:

Tutor-led Courses

All our tutor-led courses must be booked on SLA Online. Click [here](#) to visit the Login page. If you do not have an SLA Online account then please speak to your school's SLA Online co-ordinator.

eLearning Courses

Our eLearning courses are accessed via Learning Hub. Click [here](#) to visit the Login page. 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 'Further Help and Create Account' link and follow the instructions. If you already have an account and are struggling to log in please contact us on 01603 222877 or email finance.training@educatorsolutions.org.uk.

Electronic Handouts

The majority of our course handouts are now electronic and will be accessible on the course and afterwards via Learning Hub. Further information will be provided by the tutor at the session.

Ad-Hoc Sessions

Ad-hoc sessions can be arranged for your school for any of the tutor-led courses listed in this brochure. To arrange a school session, please contact us on 01603 222543 or email finance.training@educatorsolutions.org.uk.

New Finance Staff Induction

An introduction to School Finance by your nominated Finance Support Officer.

Course Outline

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

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Roles and responsibilities
- School budgets
- Financial procedures
- Sources of information

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

3 Hours

Format

This is an on-site visit booked with your Finance Support Officer

Cost

No additional cost if your school has purchased a Finance Support Package



Introduction to School Finance

An introduction to key financial processes that exist within Local Authority Maintained Schools.

Course Outline

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

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Roles and responsibilities for school finance
- Setting the budget
- Monitoring the budget
- Protecting Public Money

Phase

Local Authority Maintained Schools

Audience

Finance Staff
Headteachers
Governors

Duration

1.5 Hours

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Introduction to Star Accounts

An introduction to the financial software used in Norfolk's Local Authority Maintained schools.

Course Outline

This eLearning course provides an overview of the basic day-to-day functionality of Star Accounts.

Suitability

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

Course Content

By the end of the course, participants will gain an understanding of:

- Raising orders
- Processing payments
- Recording and banking income
- Downloads
- Bank Reconciliation
- Period End

Phase

Local Authority Maintained
Schools

Audience

Finance Staff
Headteachers
Governors

Duration

1.5 Hours

Format

This is an eLearning course
accessed through Learning Hub

Cost

No additional cost if your school
has purchased a Finance
Support Package



Star Accounts Foundation

A comprehensive foundation for using Star Accounts.

Course Outline

This training provides a comprehensive foundation for using Star Accounts. This practical, one day session teaches basic operational functionality, along with hints, tips and guidance on how to make the most of this extensive finance system.

Suitability

New Finance staff with responsibility for day-to-day processing on Star Accounts.

Course Content

By the end of this course, you will be able to:

- Understand some of the rules and procedures in purchasing for Schools
- Be able to use Star Accounts to process and report on purchases, expenditure, income and banking
- Be able to complete Star Accounts month end procedure

Phase

Local Authority Maintained
Schools

Audience

Finance Staff

Duration

1 Day

Format

This is a tutor-led course
booked through SLA Online

Cost

No additional cost if your school
has purchased a Finance
Support Package



Skills Questionnaire

This is the next step once you have completed the ‘New to Finance’ courses.

Course Outline

The ‘Skills Questionnaire’ will help you tailor your training path with regards to the courses you should complete next. It is designed to identify the specific task-based responsibilities that you have and help you make the most of the training opportunities and support that are available to you.

Suitability

Finance staff with responsibility for day-to-day processing on Star Accounts.

Course Content

By the end of the course participants will gain an understanding of:

- Your next steps for ongoing development

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

10 minutes

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Revenue Funding

An introduction to Norfolk's formula used to distribute funding to Local Authority Maintained schools.

Course Outline

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

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Funding Factors and criteria
- Pupil Premium
- Universal Infant Free School Meals
- Primary PE & Sports Grant

Phase

Local Authority Maintained Schools

Audience

Finance Staff
Headteachers
Governors

Duration

1 Hour

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Capital Funding

An introduction to capital funding and spending in Local Authority Maintained schools.

Course Outline

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.

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Capital Allocations
- Premises Development Plans
- The Devolved Formula Capital Application Form
- Monitoring Capital Funds

Phase

Local Authority Maintained Schools

Audience

Finance Staff
Headteachers
Governors

Duration

1 Hour

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Schools Financial Value Standard

An introduction to completing the annual Schools Financial Value Standard questionnaire.

Course Outline

In this course we will be examining the Schools Financial Value Standard (SFVS) questionnaire, which helps to provide assurance that standards are being met.

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Schools Financial Value Standard Questionnaire
- Timescales for completion
- Suggested evidence
- Role of the Local Authority

Phase

Local Authority Maintained Schools

Audience

Finance Staff
Headteachers
Governors

Duration

1 Hour

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Staff Monitoring

How to monitor staffing costs using the Budget Planner Software and Star Accounts.

Course Outline

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

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

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

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Headteachers

Duration

3 Hours

Format

This is a tutor-led course booked through SLA Online

Cost

No additional cost if your school has purchased a Finance Support Package



Department Codes

How to use Department Codes in Star Accounts to help control your budget.

Course Outline

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

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Benefits of department codes
- Setting up department codes
- Recording activities and trips
- Amending codes
- Department grouping
- Devolved budgets

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Headteachers

Duration

1 Hour

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Introduction to LA Budget Planner Software

How to use the LA Budget Planner software.

Course Outline

This practical course is all about using the Budget Planner Software to build and revise your school budget.

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Getting started with the Budget Planner software
- How to enter income items
- Entering expenditure items
- All aspects of the Staffing process
- How to use the Pupil Numbers Forecasting tool

Phase

Local Authority Maintained
Schools

Audience

Finance Staff
Headteachers
Business Managers

Duration

3 Hours

Format

This is a tutor-led course
booked through SLA Online

Cost

No additional cost if your school
has purchased a Finance
Support Package



Star Accounts Year End

How to process Year End following financial procedures and using Star Accounts.

Course Outline

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

Suitability

Finance Staff with responsibility for processing Year End on Star Accounts.

Course Content

By the end of the course participants will gain an understanding of:

- Year End Checklist
- Reviewing Star Accounts records
- Accruals and Prepayments
- Running Year End

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

3 Hours

Format

This is a tutor-led course booked through SLA Online

Cost

No additional cost if your school has purchased a Finance Support Package



Administering Lettings

How to use Star Accounts to administer lettings.

Course Outline

The aim of this eLearning course is provide delegates with the knowledge to effectively administer and manage the letting of school premises. It also covers the Debtors functionality within Star Accounts that is used to raise invoices for lettings.

Suitability

This course is suitable for Finance Staff who have responsibility for administering the letting of school premises.

Course Content

By the end of the course participants will gain an understanding of:

- Setting up customer and facility records
- Registering invoice payments
- Processing refunds
- Lettings reports

Phase

Local Authority Maintained
Schools

Audience

Finance Staff

Duration

1 Hour

Format

This is an eLearning course
accessed through Learning Hub

Cost

No additional cost if your school
has purchased a Finance
Support Package



Petty Cash

How to use Star Accounts to manage a Petty Cash system.

Course Outline

An eLearning module to provide delegates with the knowledge required to effectively control petty cash using Star Accounts.

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Petty Cash expenditure
- Checking receipts
- Accounting for VAT
- Adding Petty Cash transactions
- Reconciling Petty Cash

Phase

Local Authority Maintained
Schools

Audience

Finance Staff

Duration

1 Hour

Format

This is an eLearning course
accessed through Learning Hub

Cost

No additional cost if your school
has purchased a Finance
Support Package



Trading Accounts

How to use Star Accounts to run Trading Accounts.

Course Outline

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.

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

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

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

1 Hour

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Activity Accounts

How to use Star Accounts to run Activity Accounts

Course Outline

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

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Roles and Responsibilities
- Recording trip Income and Expenditure
- Creating the Activity Account
- Authorisation
- Reconciliation and Audit

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

1 Hour

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Star Asset Register

How to use the Asset Register module of Star Accounts to manage school inventory and assets.

Course Outline

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

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

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

Phase

Local Authority Maintained Schools

Audience

Finance Staff
Headteachers

Duration

1.5 Hours

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Assisted Bank Reconciliation

Step-by-step instruction on how to use the Assisted Bank Reconciliation feature in Star Accounts.

Course Outline

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.

Suitability

This course is suitable for Finance Staff who have responsibility for processing bank reconciliation in Star Accounts.

Course Content

By the end of the course participants will gain an understanding of:

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

Phase

Local Authority Maintained
Schools

Audience

Finance Staff

Duration

30 Minutes

Format

This is an eLearning course
accessed through Learning Hub

Cost

No additional cost if your school
has purchased a Finance
Support Package



Electronic Payments (BACS)

In this course you will learn how Barclays customers can use Star Accounts for processing electronic payments (BACS) .

Course Outline

The course will enable you to get an understanding of all steps involved to process BACS payments, including how to reconcile transactions at the end of the month.

Suitability

This course is suitable for Finance Staff that have responsibility for processing BACS transactions in Star Accounts.

Course Content

By the end of the course participants will gain an understanding of:

- Initial steps required prior to processing
- Processing the BACS payments to suppliers
- How to reconcile transactions at the end of the month

Phase

Local Authority Maintained
Schools

Audience

Finance Staff

Duration

1 Hour

Format

This is an eLearning course
accessed through Learning Hub

Cost

No additional cost if your school
has purchased a Finance
Support Package



Star Accounts Refresher

Plenty of hints and tip to help you get the most out of Star Accounts.

Course Outline

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.

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.

Course Content

By the end of the course participants will gain an understanding of:

- Core functionality refresher
- Extra functionality of Star
- Resolving common problems
- Cheque / Remittance printing
- Star Accounts reporting suite

Phase

Local Authority Maintained
Schools

Audience

Finance Staff

Duration

1 Day

Format

This is a tutor-led course
booked through SLA Online

Cost

No additional cost if your school
has purchased a Finance
Support Package



How to process journals in Star Accounts.

Course Outline

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

Suitability

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

Course Content

By the end of the course, participants will gain an understanding of:

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

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

1 Hour

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Dinner Monies Database

How use the Dinner Monies Database for recording pupil meals.

Course Outline

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.

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Setting up the database
- Entering school meals data
- Recording cash received
- Entering banking details
- Printing weekly reports

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

3 Hours

Format

This is a tutor-led course booked through SLA Online.

Cost

No additional cost if your school has purchased a Finance Support Package.



School Fund

How to use Star Accounts to manage the school fund account.

Course Outline

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.

Suitability

Finance Staff responsible for the administration of the school fund.

Course Content

By the end of the course participants will gain an understanding of:

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

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

1 Hour

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Sickness Insurance

How to use the Sickness Insurance Database to register claims.

Course Outline

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

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- NCC Sickness Insurance Scheme
- Sickness Insurance Database
- Importing staff details
- Entering contract details
- Registering claims
- Processing monthly returns

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

1 Hour

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Purchasing Cards

Step-by-step instruction on how to administer the Purchasing Card system in schools.

Course Outline

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.

Suitability

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

Course Content

By the end of the course participants will gain an understanding of:

- Purchasing Card procedures
- Cardholder processes
- Approver processes
- Barclaycard Spend Management
- Checking download costs

Phase

Local Authority Maintained Schools

Audience

Finance Staff

Duration

1.5 Hours

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Fraud Awareness for Schools

An introduction to your role in fighting fraud in schools.

Course Outline

This eLearning course is designed to improve awareness to the background of fighting fraud, what constitutes fraud and how to spot it.

Suitability

This course is ideal for all Finance Staff, Headteachers and Governors working within schools.

Course Content

By the end of the course participants will gain an understanding of:

- What fraud is
- The scale and impact of fraud
- NCC's stance on fraud
- Causes and types of fraud in schools
- Your role in reporting fraud

Phase

Local Authority Maintained Schools

Audience

Finance Staff
Headteachers
Governors

Duration

30 Minutes

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Fraud Prevention and Detection

An introduction to your role in preventing and detecting fraud in schools.

Course Outline

This eLearning course is designed to give everyone involved in school finance an overview of how to prevent and detect fraud within the school environment.

Suitability

This course is ideal for all new and existing Finance Staff, Headteachers and Governors who have responsibility for protecting public money.

Course Content

By the end of the course participants will gain an understanding of:

- NCC's stance on fraud
- Your systems and responsibilities
- Detecting fraud
- Preventing and reporting fraud

Phase

Local Authority Maintained Schools

Audience

Finance staff

Governors

Headteachers

Duration

30 Minutes

Format

This is an eLearning course accessed through Learning Hub

Cost

No additional cost if your school has purchased a Finance Support Package



Fighting Financial Fraud

A stimulating insight into raising awareness of potential fraud and the methods you could utilise to ultimately eradicate the daily business threat.

Course Outline

The world that we live in today is fraught with potential risk from fraudulent activity. It is imperative that we are fully aware of the different types of threat and the necessary controls that must be in place to ensure the safety of public money and the risk fraud places on the important future of our pupils.

Suitability

This course is ideal for new and existing Finance Staff, Headteachers and Deputies.

Course Content

By the end of the course, participants will gain an understanding of:

- Identifying the risk from possible sources of fraud
- Establishing existing best practice from colleagues
- Effective controls within the business
- Distinguishing and addressing areas of weakness

Phase

Local Authority Maintained
Schools

Audience

Finance Staff
Headteachers

Duration

3 Hours

Format

This is a tutor-led course
booked through SLA Online

Cost

No additional cost if your school
has purchased a Finance
Support Package



Introduction to Academy Finance

An introduction to key financial management processes that must exist within Academies.

Course Outline

In this course we will examine requirements for budgeting, fixed assets, cash flow, policies and financial statements giving you a great starting point for understanding how Academy finance works.

Suitability

This course is ideal for new and existing Finance Staff, Headteachers and Governors working in schools converting, or thinking of converting, to Academy status.

Course Content

By the end of the course participants will gain an understanding of:

- Academy budget setting processes
- Academy budget monitoring requirements
- Fixed assets
- Policies and procedures
- Academy financial reporting requirements

Phase

Local Authority Maintained Schools and Academies

Audience

Finance Staff

Governors

Headteachers

Schedule of Dates

See SLA Online

Duration

3 Hours

Format

This is a tutor led course

Cost

No additional cost if your school has purchased a Finance Support Package



Academy Financial Statements

An introduction to the annual financial reporting requirements for Academies.

Course Outline

In this course we will examine the purpose, importance and content of the key statements and reports that must be produced by Academies, along with looking at the differences between them and how they interact.

Suitability

This course is ideal for new and existing Finance Staff, Headteachers and Governors working in schools converting, or thinking of converting, to Academy status.

Course Content

By the end of the course participants will gain an understanding of:

- Financial reporting requirements of Academies
- Key components of financial statements
- Content and purpose of the SOFA
- Content and purpose of the Balance Sheet

Phase

Local Authority Maintained Schools and Academies

Audience

Finance Staff

Governors

Headteachers

Schedule of Dates

See SLA Online

Duration

3 hours

Format

This is a tutor led course

Cost

£140 per delegate

(not included as part of the Finance Support package)



A suite of nationally recognised professional qualifications to support finance staff and business managers in educational establishments.

Outline

With the increasing pressure to provide value for money in a fast-paced environment, it is more important than ever for finance professionals working within educational establishments to further develop their business, finance and accountancy skills to support the achievement of educational goals.

To support this, we offer an industry-first suite of professional qualifications that aim to provide Finance Staff and Business Managers with the finance and accountancy knowledge needed to administer, manage and lead finances within Schools, Academies, Multi-Academy Trusts and Free Schools.



Each qualification is published on the Regulated Qualification Framework and provides practical, real-world accounting and finance knowledge that you can put to use from day one. With a Finance in Education qualification on your CV, you will demonstrate a level of excellence sought after by educational establishments across the UK.

To find out further details about our Finance in Education Qualifications, including the various ways that you can access the learning, please contact the Training Team on 01603 222543 or financequalifications@educatorsolutions.org.uk

Bookkeeping in Educational Establishments

A highly interactive course leading to a Level 2 Award in Bookkeeping in Educational Establishments

Course Outline

During the course you will look at how to manage the books including the foundations of double-entry bookkeeping, associated documents, processes and procedures, focussing on how these impact on educational establishments.

Suitability

This course is ideal for all Finance Staff and Business Managers and is especially beneficial to those working in schools that are considering converting to academy status

Outcome

Once you have completed the tutor-led session you will be ready to take your assessment.

This is an online, open book type assessment that typically takes approximately two hours to complete. Successful completion of the assessment will give the learner an accredited qualification, Level 2 Award in Bookkeeping in Educational Establishments.

Phase

Local Authority Maintained
Schools and Academies

Audience

Finance Staff
Business Managers

Schedule of Dates

See SLA Online

Duration

3 Tutor-led sessions comprising
2 full days and 1 half day

Format

This is a scheduled tutor led
course booked through SLA
Online.

Cost

**£600 per delegate including
assessment costs**



VAT in Educational Establishments

In this course you'll master day-to-day accounting processes for VAT whilst making a significant contribution towards the achievement of your establishments educational

Course Outline

During the tutor led session, you will look at how to account for VAT in order to comply with legislation and how to perform the calculations needed to complete a VAT return.

Suitability

This course is ideal for Finance Staff and Business Managers and is especially beneficial to those working in schools that are considering converting to academy status.

Outcome

Once you have completed the tutor led sessions you will be ready to take your assessment.

This is an online, open book type assessment that typically takes approximately two hours to complete.

Phase

Local Authority Maintained
Schools and Academies

Audience

Finance Staff
Business Managers

Schedule of Dates

See SLA Online

Duration

Full Day

Format

This is a scheduled tutor led
course booked through SLA
Online

Cost

£240 per delegate including
assessment costs

Successful completion of the
course and assessment will
provide 2 credits that will count
towards your accumulated
learning credit total



Costing in Educational Establishments

In this course you'll master day-to-day costing processes whilst making a significant contribution towards the achievement of your establishments

Course Outline

During the tutor led session, you will look at how to extract costing data and perform calculations to provide essential information used to inform decision-making processes.

Suitability

This course is ideal for Finance Staff and Business Managers and is especially beneficial to those working in schools that are considering converting to academy status.

Outcome

Once you have completed the tutor led sessions you will be ready to take your assessment.

This is an online, open book type assessment that typically takes approximately two hours to complete.

Phase

Local Authority Maintained Schools and Academies

Audience

Finance Staff

Business Managers

Schedule of Dates

See SLA Online

Duration

Full Day

Format

This is a scheduled tutor led course booked through SLA Online

Cost

£240 per delegate including assessment costs

Successful completion of the course and assessment will provide 2 credits that will count towards your accumulated learning credit total



The Finance RAG (Red / Amber / Green) Matrix is an early warning system which helps the Local Authority to assess financial risk in schools and so 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, including training to be met.

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 current requirements are:

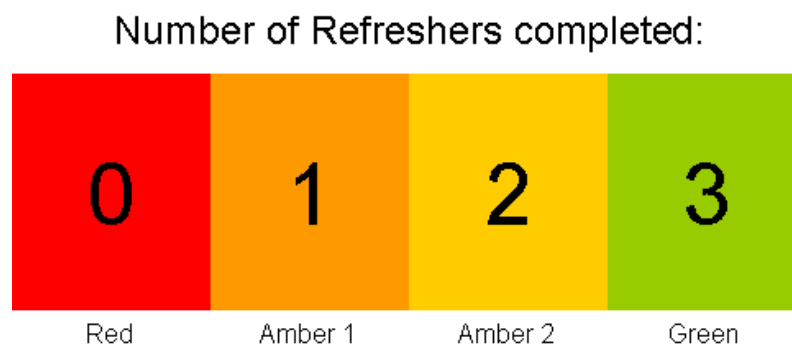
Courses completed:

None	Induction Visit	Introduction to School Finance & Introduction to Star Accounts	New to Finance & Finance Skills Questionnaire
Red	Amber 1	Amber 2	Green

To support this process, each new finance officer will be issued with a personalised Finance Training Plan, based on pre-defined skill requirements. This is designed to help make the most of the 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 their 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 are additional options available. Finance staff can also attend any of the following as refreshers:

- Any course listed in the Governors and Headteachers brochures
- Level 3 Certificate in Administering Finance in Education Qualification
- Level 4 Certificate in Managing Finance in Education Qualification
- Budget Workshop
- Attendance at a Budget Visit
- Other Ad-Hoc Finance Briefing / Event held by the Finance Team





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