

Finance & Financial Software Training

Spring Term training opportunities

Children's Services Finance offer a wide range of finance courses for school secretaries and finance staff covering topics such as FMSiS, Star Accounts, Basic Financial Procedures, How to Use the Budget Planner Software, Budget Workshops and Dinner Monies database.

All of our courses have been specifically designed to cover all aspects of financial management in Schools and are targeted at various levels.

Booking a course couldn't be any easier! There are 3 easy ways for you to choose from:

On-line

You can book on-line by visiting <http://efs.norfolk.gov.uk>. Select Courses, info and booking from the A-Z.

E-mail

You can send an email to richard.boyd@norfolk.gov.uk. Please include your name, school name and location number, course title and the date that you would like to attend in your email.

Phone

You can call Richard Boyd on **01603 223390**.

Once you have made your booking you can leave the rest to us!

You will be sent an email confirming your booking usually within 24 hours followed by detailed Joining Instructions around 2 weeks before the course date.

Please find attached the scheduled training courses for the Spring Term 2009.

FINANCE AND FINANCIAL SOFTWARE TRAINING DECEMBER 2008 – MARCH 2009

Autumn/Spring Term Dates		Places available on the Following courses:		
11 th	December 2008	09:30 – 13:00	FMSiS Workshop	<i>PDC</i>
7 th	January 2009	09:30 – 16:00	Basic Financial Procedures	<i>PDC</i>
8 th	January 2009	09:30 – 13:00	How to Use the Budget Planner Software	<i>PDC</i>
14 th	January 2009	09:30 – 13:00	How to Use the Budget Planner Software	<i>EcoTech</i>
19 th	January 2009	09:30 – 13:00	How to Use the Budget Planner Software	<i>PDC</i>
20 th	January 2009	09:30 – 13:00	Dinner Monies Database	<i>PDC</i>
22 nd	January 2009	09:30 – 16:00	New School Finance Staff Induction (Star)	<i>PDC</i>
3 rd	March 2009	09:30 – 14:30	Budget Workshop	<i>EcoTech</i>
12 th	March 2009	09:30 – 14:30	Budget Workshop	<i>PDC</i>
13 th	March 2009	09:30 – 14:30	Budget Workshop	<i>PDC</i>
17 th	March 2009	09:30 – 14:30	Budget Workshop	<i>PDC</i>
18 th	March 2009	09:30 – 14:30	Budget Workshop	<i>PDC</i>
19 th	March 2009	09:30 – 14:30	Budget Workshop	<i>PDC</i>
23 rd	March 2009	09:30 – 14:30	Budget Workshop	<i>PDC</i>
24 th	March 2009	09:30 – 13:00	FMSiS Workshop	<i>PDC</i>
25 th	March 2009	09:30 – 13:00	FMSiS Workshop	<i>PDC</i>
27 th	March 2009	09:30 – 14:30	Budget Workshop	<i>PDC</i>
30 th	March 2009	09:30 – 14:30	Budget Workshop	<i>PDC</i>

CSF03 Budget Workshops			
3rd March 2009 12th March 2009 – 30th March 2009 *		09:30 – 14:30 09:30 – 14:30	EcoTech Centre, Swaffham Professional Development Centre, Norwich * Many dates throughout March (see schedule on previous page)
Who should attend? - This course is intended for those staff responsible for constructing the school's Budget Plan. Delegates attending this course MUST have a working knowledge of the Budget Planner Spreadsheet. Places are still available for Budget Planner Spreadsheet courses at PDC and EcoTech (see next page).			
Aim - To provide those staff responsible for setting the budget an opportunity to complete their budget plan and/or staffing spreadsheets in a supported environment. Finance Support Officers will be on-hand to offer any advice as needed. Schools will work at their own pace on their own budgets.			

Guidance will be given on the following: <ul style="list-style-type: none"> • Calculating Staff Costs • Construction of the Budget Plan • Changes to the Budget Planner Spreadsheet
Additional requirements - Schools will need to bring along a laptop which has the new year budget planner and their prior year budget plan already loaded plus any staffing details. If a laptop is not available please ring 01603 223390.

Course fee: £85 (Free with Small School, Basic + Community Packages)

CSF07 How to use the Budget Planner Software

8 th January 2009	09:30 – 13:00	Professional Development Centre, Norwich
14 th January 2009	09:30 – 13:00	EcoTech Centre, Swaffham
19 th January 2009	09:30 – 13:00	Professional Development Centre, Norwich

Who should attend? - This course is intended for school staff who are required to use the budget planner software to set & revise budgets, and are unfamiliar with the full functionality of the tool.

Aim - The aim of this course is to ensure familiarity with the budget planner software, including effective use of the staffing spreadsheets. Delegates attending Budget Workshops are expected to be familiar with the workings of the Budget Planner Spreadsheet.

The session will cover the basic functions of the spreadsheet, including:

- Calculating staffing costs
- Future Year projections
- Three-year budget plan
- Budget Revisions

Course fee £85

CSF09 Dinner Monies Database		
20 th January 2009	09:30 – 13:00	Professional Development Centre, Norwich
Who should attend? - This course is intended for school staff who would like to use the new Dinner Monies Database to assist with dinner money collection and recording.		
<p>Aim - The aim of this course is to ensure that staff operating the Dinner Monies Database are familiar with its functionality.</p> <p>This course will cover:</p> <ul style="list-style-type: none"> • Audit requirements • Overview of the Database • Entering class/pupil names • Weekly roll forward • Milk/Snack Money • Staff Dinners 		

The Dinner Monies Database has received excellent feedback from schools. Admin and finance staff have reported that it is easy to use and saves them much time and trouble. This is the last course in the current year's programme.

Course fee £85

CSF10 Basic Financial Procedures

7th January 2009

09:30 – 16:00

Professional Development Centre, Norwich

Who should attend? - This session is intended for staff with little or no previous experience of schools' financial procedures.

Aim - This course aims to provide new finance staff with an introduction to financial procedures and to ensure that the school has a mechanism in place to ensure that financial control is maintained in the absence of key personnel. This course gives a general overview of school finance procedures, including:

- Roles and Responsibilities
- Funding
- Budget Plans
- The Payment Cycle
- The Budget Cycle.

It does not involve the use of Star Accounts (see CSF11).

Course fee £139 (free if booked with CSF11)

CSF11 New School Finance Staff Induction (Star Accounts)		
22nd January 2009	09:30 – 16:00	Professional Development Centre, Norwich
Who should attend? - This course is intended for new school administrators who will be responsible for day-to-day maintenance of the school's financial records and finance staff who need to know how to use Star Accounts.		
Aim - The aim of this course is to ensure that new school administrators are given the initial training required to maintain the school financial records in accordance with financial regulations and audit requirements. Delegates will have the opportunity to learn the basics of Star Accounts and will work through exercises using the system, including producing reports, monthly reconciliations and downloads. This course is normally undertaken as the second day of a two day course in conjunction with Basic Financial Procedures (CSF10). This session will cover: <ul style="list-style-type: none">• Inputting orders and transactions• Monthly reconciliations• Monthly downloads• Month end procedures• Setting up department codes• Reports		

Course fee: Free of charge

CSF14 Financial Management Standard in Schools (FMSiS) Workshop

11th December 2008	09:30 – 13:00	Professional Development Centre, Norwich
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Refresher Courses:

24th March 2009	09:30 – 13:00	Professional Development Centre, Norwich
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25th March 2009	09:30 – 13:00	Professional Development Centre, Norwich
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Who should attend? – This session is intended for headteachers and school staff who will be involved with carrying out the self-evaluation of the school's financial management systems.

Aim – The aim of this course is to enable delegates to work through the self-evaluation questionnaire, while receiving guidance on what evidence will be required to meet the standard and how to present it. The session also covers what is included in the Financial Management Toolkit and what the External Assessment Process involves.

Course fee £85 (Free with FMSiS Support Package)

Venues: Professional Development Centre, Woodside Road, Norwich, NR7 9QL
EcoTech Centre, Turbine Way, Swaffham, PE37 7HT

Ring 01603 223390 for more information about training courses or to discuss your training requirements