



Finance & Financial Software Training

Summer 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, School Finance 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 csfinancetraining@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.

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 Summer Term 2009.

FINANCE AND FINANCIAL SOFTWARE TRAINING APRIL – JULY 2009

Summer Term Dates		Places available on the following courses:		
29 th	April 2009	09:30 – 16:00	Welcome to School Finance	<i>Norwich</i>
30 th	April 2009	09:30 – 13:00	FMSiS Workshop	<i>Norwich</i>
1 st	May 2009	09:30 – 16:00	Star Accounts Foundation	<i>Norwich</i>
7 th	May 2009	09:30 – 13:00	FMSiS Workshop	<i>Norwich</i>
12 th	May 2009	09:30 – 16:00	Budget Setting	<i>Norwich</i>
13 th	May 2009	09:30 – 13:00	School Finance Refresher	<i>King's Lynn</i>
14 th	May 2009	09:30 – 13:00	Star Accounts Extra	<i>Swaffham</i>
15 th	May 2009	09:30 – 16:00	Strategic Overview	<i>Norwich</i>
8 th	June 2009	09:30 – 12:30	Accounting for the School Fund	<i>Norwich</i>
8 th	June 2009	13:30 – 16:00	Star School Fund	<i>Norwich</i>
9 th	June 2009	09:30 – 13:00	Star Accounts Extra	<i>Norwich</i>
10 th	June 2009	09:30 – 16:00	Monitoring & Reporting on the Budget	<i>Norwich</i>
11 th	June 2009	09:30 – 13:00	Dinner Monies Database	<i>Norwich</i>
12 th	June 2009	09:30 – 13:00	FMSiS Workshop	<i>Norwich</i>
19 th	June 2009	09:30 – 16:00	Welcome to School Finance	<i>King's Lynn</i>
22 nd	June 2009	09:30 – 16:00	Star Accounts Foundation	<i>King's Lynn</i>
25 th	June 2009	09:30 – 16:00	Budget Setting	<i>Swaffham</i>
26 th	June 2009	09:30 – 16:00	Strategic Overview	<i>King's Lynn</i>
30 th	June 2009	09:30 – 13:00	VAT for Schools	<i>King's Lynn</i>
2 nd	July 2009	09:30 – 13:00	FMSiS Workshop	<i>King's Lynn</i>
3 rd	July 2009	09:30 – 13:00	School Finance Refresher	<i>Norwich</i>
6 th	July 2009	09:30 – 16:00	Monitoring & Reporting on the Budget	<i>Swaffham</i>

7 th July 2009		09:30 – 16:00	Revising & Forecasting the Budget	<i>Norwich</i>
8 th July 2009		09:30 – 13:00	VAT for Schools	<i>Norwich</i>
9 th July 2009		09:30 – 16:00	Budget Setting	<i>King's Lynn</i>
10 th July 2009		09:30 – 13:00	FMSiS Workshop	<i>King's Lynn</i>

CSF01 Dinner Monies Database

11 th June 2009		09:30 – 14:30	Professional Development Centre, Norwich
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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.

Aim - The aim of this course is to ensure that staff operating the Dinner Monies Database are familiar with its functionality.

This course will cover:

- Audit requirements
- Overview of the Database
- Entering class/pupil names
- Recording Cash received
- Weekly roll forward
- Milk/Snack Money
- Staff Dinners

Course fee: £88 (Free with Small School, Basic + Community Packages)

CSF04 Star Accounts Extra

14th May 2009
9th June 2009

09:30 – 13:00
09:30 – 13:00

Professional Development Centre, Norwich
EcoTech Centre, Swaffham

Who should attend? - Staff currently using Star Accounts who would like to learn more about its functionality and how to sort out common problems.

Aim - The aim of this course is to provide a more detailed understanding of the software with plenty of useful hints, tips and problem solving activities.

The course will cover:

- Star Accounts shortcut keys
- Common problems and how to solve them
- Using Star reports
- Frequently Asked Questions
- Cheque printing
- Best Practice

Course fee £88

CSF12 School Fund Accounting & CSF06 Star School Fund			
8 th June 2009	CSF12 CSF06	09:30 – 12:30 13:30 – 16:00	Professional Development Centre, Norwich
Who should attend? – Staff who are responsible for the administration of the School Fund and/or those who would like to use Star Accounts to account for the School Fund.			
<p>Aim - The aim of this course is to ensure that delegates are aware of best practice when accounting for the school fund, followed by practical based training on how to use Star Accounts for the school fund.</p> <div> <div> The School Fund Accounting course will cover: <ul style="list-style-type: none"> • What the School Fund can be used for • Roles and responsibilities • Accounting for income and expenditure • Month end reconciliation • School Fund audit requirements • Year end balance sheet </div> <div> The Star School Fund course will cover: <ul style="list-style-type: none"> • Establishing a starting point for transferring to Star • Downloading and setting up Star school fund datafile • Entering School Fund transactions • Completing a journal transfer • Performing month end reconciliations • Year end requirements </div> </div>			

The courses can be taken individually or together as a full day course.

Course fee £88 for each half day course or £143 for the full day

CSF07 Budget Setting		
12th May 2009	09:30 – 16:00	Professional Development Centre, Norwich
25th June 2009	09:30 – 16:00	EcoTech Centre, Swaffham
9th July 2009	09:30 – 16:00	West Norfolk PDC, King's Lynn

Who should attend? - Staff new to budgets who would like to understand budget setting and how to use the Budget Planner Software.

Aim - This course is ideally suited for staff with little or no previous experience of school budgets...a back to basics look at where to find information to help create a budget from scratch. The course also includes the use of the budget planner software.

Contents of this course will include:

- Roles and responsibilities
- Funding and Budget Share
- The Budget Pack
- Staffing Costs
- Setting the Budget Plan
- Budget Commentary Form
- Using the Budget Planner Software

Course fee £143

CSF08 Monitoring & Reporting on the Budget

10th June 2009
6th July 2009

09:30 – 16:00
09:30 – 16:00

Professional Development Centre, Norwich
EcoTech Centre, Swaffham

Who should attend? - Staff who produce and check financial reports against budget and those responsible for the effective management of the budget.

Aim - The aim of this course is to give delegates a practical understanding of the monitoring process and how to use the reporting function of Star Accounts to investigate any issues identified.

The course will cover:

- The Budget Cycle
- Financial Planning Model
- Monitoring best practice guidelines
- Practice in monitoring a school budget
- Benchmarking
- Using Star Accounts to print reports to assist the monitoring process

Course fee £143

CSF09 Revising & Forecasting

7th July 2009

09:30 – 16:00

Professional Development Centre, Norwich

Who should attend? - Staff who have budgetary responsibilities or are using the budget planner software for revising and forecasting budgets.

Aim - This course covers the budget revision and forecasting processes and provides delegates with plenty of practice in using the Budget Planner software to make revisions.

The course will cover:

- Why and when to revise
- Information and tools available to assist in budget revisions
- Using the budget planner software to make budget revisions and forecasts
- Best Practice for forward planning

Course fee £143

CSF11 Financial Management Standard in Schools (FMSiS) Workshop

30 th April 2009	09:30 – 13:00	Professional Development Centre, Norwich
7 th May 2009	09:30 – 13:00	Professional Development Centre, Norwich
12 th June 2009	09:30 – 13:00	Professional Development Centre, Norwich
2 nd July 2009	09:30 – 13:00	West Norfolk PDC, King's Lynn
10 th July 2009	09:30 – 13:00	West Norfolk PDC, King's Lynn

Who should attend? – This session is intended for headteachers, school staff and governors who will be involved with carrying out the self-evaluation of the school's financial management systems and producing the file of evidence for assessment.

Aim – The aim of this course is to provide delegates with information about the requirements of FMSiS and what evidence will be required to achieve the standard. The session includes full guidance on the use of Norfolk specific forms and checklists.

Coverage of the course includes:

- Background and timetable
- FMSiS website
- Assessment tool and checklist
- External Assessment process
- Celebrating success

Course fee £88 (Free for up to two delegates with the Primary School FMSiS Support Package)

CSF17 Welcome to School Finance		Induction Day 1
29 th April 2009 19 th June 2009	09:30 – 16:00 09:30 – 16:00	Professional Development Centre, Norwich West Norfolk PDC, King's Lynn
<p>Who should attend? - This session is intended for new school finance staff or staff who require a basic overview of school finances.</p> <p>Aim - This course aims to provide new finance staff with an introduction to school finances. It takes an interactive approach as delegates explore essential elements of school budgets and financial procedures.</p> <ul style="list-style-type: none"> • Roles and Responsibilities • Budget Share • The Budget Plan • Financial procedures and controls • VAT • Budget monitoring • Sources of information <p>It does not involve the use of Star Accounts (see CSF18).</p> <p>Course fee: Free of charge</p>		

CSF18 Star Accounts Foundation		Induction Day 2
1 st May 2009 22 nd June 2009	09:30 – 16:00 09:30 – 16:00	Professional Development Centre, Norwich West Norfolk PDC, King's Lynn
<p>Who should attend? - This course is intended for new school finance staff or those who need basic training on Star Accounts.</p>		
<p>Aim - The aim of this course is to ensure that delegates can use Star Accounts to raise orders, process invoices and perform a bank reconciliation and period end. This course offers plenty of time to practice using Star Accounts in a safe environment.</p> <p>It is recommended that new finance staff attend both of the induction days.</p> <p>This session will cover:</p> <ul style="list-style-type: none"> • Processing orders • Processing invoices • Processing downloads • Performing a bank reconciliation • Running the period end process • Setting up department codes • Entering budgets 		

Course fee: Free of charge

Venues: Professional Development Centre, Woodside Road, Norwich, NR7 9QL
EcoTech Centre, Turbine Way, Swaffham, PE37 7HT
West Norfolk Professional Development Centre, Kilham's Way, King's Lynn, PE30 2HU

Book online at <http://www.eficts.norfolk.gov.uk/Finance/Training/>

Email csfinancetraining@norfolk.gov.uk with details of the course, yourself and your school

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