



Finance Training

Finance Staff Training

Sept 2023 – July 2024

Welcome

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

The training team has developed the Finance Staff training programme to offer online material and resources, including eLearning courses and short video presentations along with live classroom based and online webinar sessions.

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 **of Norfolk LA maintained schools only** can be found on [pages 25 and 26](#)

All scheduled courses (including online), eLearning courses, support materials and resources are provided at no additional cost if your school has purchased a finance support or training package for the current year (unless otherwise stated).

If your school hasn't purchased a finance support or training package, then please contact us for further details.

On the next few pages, you will find a list of all the courses in the programme followed by detailed course pages.

A full schedule of classroom based and online webinar sessions can be found on [Pages 27, 28 & 29.](#)

Details of our cancellation policy can be found on [Page 29.](#)

Further information can be found by contacting us on 01603 306407, via email finance.training@norfolk.gov.uk or via our website [Norfolk Schools - Finance Training](#)

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Bookings

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

Webinar and Classroom sessions

Places on webinar sessions (including individual) and classroom based, tutor led sessions can be booked via our online booking portal, [SLA Online](#).

Dates and times for all standard sessions can be found on SLA Online – **details of individual sessions will be advised separately.**

You will be provided with details via email on how to access the standard webinar sessions ahead of the scheduled/advised delivery date and time.

All information regarding course bookings will be sent to the email address used on the initial booking so please make sure that it is correct and that our email address, finance.training@norfolk.gov.uk, is added to your 'safe senders' list so that you can successfully receive our emails.

eLearning Courses and Online Resources

Our eLearning courses, video presentations and online resources are accessed via NCC's HR and learning management system, myOracle

If you are struggling to access the myOracle system, please contact the HR advice and support team on ehenquiries@norfolk.gov.uk or 01603 307760.

If you can access the system but are struggling to find our courses, in the first instance please try using the search term **Education Finance** - all of our courses should then appear. If you still encounter any issues, please contact the training team on finance.training@norfolk.gov.uk 01603 306407.

Finance in Education Qualifications

The Finance in Education qualifications can be booked by visiting our website [Norfolk Schools - Finance in Education qualifications](#)

Introduction to School Finance

An introduction to key financial processes that exist within educational establishments.

Course Outline

This course provides an overview of school finance from funding through to budgeting and protecting public money – a great starting point for those who are new to school finances.

Course Content

By the end of the course, participants will be able to:

- Describe the responsibilities of finance staff, headteachers and governors for finances in schools
- Identify the steps involved in setting a budget for the financial year
- Review reports used for monitoring the budget
- Identify key financial controls in place to protect public money

Suitability

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

Norfolk local authority maintained schools only.

Audience

Finance staff, headteachers and governors.

Important Information

This is an eLearning course accessed through myOracle.

Introduction to Star Accounts

An introduction to the financial software used in Norfolk local authority maintained schools.

Course Outline

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

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 and Period End

Suitability

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

Norfolk local authority maintained schools only.

Audience

Finance staff, headteachers and governors.

Important Information

This is an eLearning course accessed through myOracle.

Star Accounts Foundation

This course builds on the Introduction to Star Accounts eLearning course.

Course Outline

This course focusses on three crucial areas of financial administration, Purchasing & Expenditure, Income & Banking and Month End.

Course Content

By the end of the full course package, participants will be able to:

- Carry out the main processes of purchasing and expenditure using Star Accounts
- Carry out the main processes of income and banking using Star Accounts
- Complete the necessary actions in Star Accounts to complete the month end process and roll forward to the next month

The full aims and objectives of the course can be found on the course page within myOracle or on SLA Online.

Suitability

This course is essential for all new finance staff.

Norfolk local authority maintained schools only.

Audience

Finance staff.

Important Information

The course consists of 3 eLearning courses (accessed through myOracle) **and** 3 webinar sessions – one for each area of finance (Purchasing & Expenditure, Income & Banking and Month End) booked through SLA Online. **All elements must be completed to register full course completion.** A half day classroom based course is available as an **alternative** to the 3 webinar sessions – this session will cover all three areas of finance. If you are considering the classroom based session, please see SLA online for further details of the pre session work that must be completed.

Budget Setting

A robust and substantive budget is the foundation of sound financial management.

Course Outline

This course outlines the budget setting process, identifying the information available to enable the construction of a robust and substantive budget.

Course Content

By the end of the full course package, participants will be able to:

- Identifying the information that is needed in setting a budget
- Explain why setting an accurate budget is important to educational establishments
- Understand how budgets are constructed in an educational establishment
- Identify the documentation used when setting a budget

Suitability

This course is suitable for all new and existing finance staff.

Norfolk local authority maintained schools.

Audience

Finance staff and headteachers.

Important Information

This course consists of an eLearning course (Budget Setting) with two additional short video presentations (Budget Share and Financial Coding for LA Maintained Schools) accessed through myOracle **or** alternatively a classroom based tutor led session booked through SLA Online. **In order to register full course completion you will need to complete the 2 video presentations and either the eLearning or classroom based session.**

Effective Budget Monitoring

Keeping control of the budget is an important aspect of successful financial management.

Course Outline

This course explores effective budget monitoring practices used by educational establishments, from budget control through to identifying budget variances.

Course Content

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

- The principles of budget control
- Budget Outturn and recommending improvements
- How to use reports to identify budget variances
- Analysing and identifying appropriate actions to deal with variances

Suitability

This course is ideal for existing finance staff.

Norfolk local authority maintained schools.

Audience

Finance staff, headteachers and governors.

Important information

This course consists of two short video presentations (The Budget Cycle & Budget Outturn) accessed through myOracle **and** either a webinar session or alternatively a classroom based tutor led session booked through SLA Online. In addition it is essential that you complete the **Staff Monitoring** eLearning course that can also be accessed via myOracle. **All elements must be completed to register full course completion.**

Costing Development Plans and Initiatives

Being able to calculate the cost of delivering an initiative accurately is an essential skill for those charged with financial management.

Course Outline

This course details how to interpret costing data to provide essential information in the decision-making processes of educational establishments.

Course Content

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

- The costing information used in educational establishments
- How to link the development plans to the production of realistic budget figures
- Preparing full and accurate costing plans for initiatives and activities

Suitability

This course is ideal for existing finance staff.

Norfolk local authority maintained schools.

Audience

Finance staff, headteachers and governors.

Important information

This is an eLearning course accessed through myOracle.

Introduction to LA Budget Planner

How to use the LA Budget Planner Software.

Course Outline

This practical session is all about using the Budget Planner software to build and revise your 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 and expenditure items
- The staffing process
- How to use the pupil numbers forecasting tool to revise the budget

Suitability

This course is ideal for new and existing finance staff.

Norfolk local authority maintained schools only.

Audience

Finance staff and headteachers.

Important information

This is an individual webinar session delivered by the Finance Support Team. The date and time of your specific session will be advised after your place has been booked through SLA Online (please ignore the date quoted in SLA Online). Please note, priority may be given to people that have not already attended a session over the last year.

Staff Monitoring

Staff monitoring is an essential part of effective financial management for any educational establishment.

Course Outline

This course is all about the effective and robust monitoring of staffing costs within schools.

Course Content

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

- The importance of staff monitoring
- The impact of staffing on budget variances when monitoring the budget
- The importance of future planning for staffing
- How on-costs can impact on the staffing budget
- The importance of good housekeeping in budget systems

Suitability

This course is ideal for new and existing finance staff.

Norfolk local authority maintained schools only.

Audience

Finance staff and headteachers.

Important information

This course consists of an eLearning course accessed through myOracle **and** an individual webinar session booked through SLA Online and delivered by the Finance Support Team. **The date and time of your specific webinar session will be advised after your place has been booked (ignore the date quoted in SLA Online)** The eLearning course **must** be completed before you attend your individual webinar session. Please note priority may be given to people that have not already attended a session over the last year.

Year End in Star Accounts

How to process year end in Star Accounts following financial procedures.

Course Outline

This course provides practical training on what to expect at the end of the financial year and how to undertake the tasks required in Star Accounts.

Course Content

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

- The preparation needed for year end
- Accruals and prepayments
- Processing year end
- 31st March bank reconciliation
- Downloads at year end

Suitability

This course is suitable for new and existing finance staff.

Norfolk local authority maintained schools only.

Audience

Finance staff.

Important information

This course consists of either a webinar session **or** alternatively a classroom based tutor led session, booked through SLA Online. **(The classroom session is designed for new to role staff and/or those undertaking their first year end process).**

Fighting Financial Fraud

Minimising the risk of fraud is crucial to the responsible management of public money.

Course Outline

This course is about how we need to be fully aware of the different types of threat and the necessary controls that must be in place to ensure the safety of public money.

Course Content

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

- What fraud is
- The risks from possible sources of fraud
- How fraud can be detected
- Effective controls within the business
- The Whistleblowing process within your setting
- Distinguishing and addressing areas of weakness to improve existing controls

Suitability

This course is suitable for new and existing finance staff.

Norfolk local authority maintained schools only.

Audience

Finance staff, headteachers and governors.

Important information

This course consists of an eLearning course (Fraud Awareness: Prevention & Detection) with an additional short video presentation (Whistleblowing) accessed through myOracle **and** either a webinar session or alternatively a classroom based tutor led session booked through SLA Online. **All elements must be completed to register full course completion.**

Achieving Value for Money

An in-depth look at the requirement for ensuring value for money within school expenditure.

Course Outline

This course is about how schools and academies can obtain best value with the resources available and follow rules, regulations and best practice relating to procurement.

Course Content

During this course participants will:

- Learn what 'value for money' means
- Explore 'economy', 'efficiency' and 'effectiveness'
- Discover why achieving value for money is important
- Explore some of the strategic ways to achieve value for money
- Learn the different steps within a typical procurement cycle

Suitability

This course is suitable for new and existing finance staff.

Norfolk local authority maintained schools.

Audience

Finance staff, headteachers and governors.

Important information

This course consists of two eLearning courses (Exploring Value for Money and A Strategic Approach to Achieving Value for Money) and a short video presentation (The Procurement Cycle) accessed through myOracle.

Financial Benchmarking & ICFP

Carrying out benchmarking activities as part of an educational establishments annual planning cycle is a crucial mechanism to support robust financial health.

Course Outline

This course provides an overview of the benchmarking process and the value that it can add to an educational establishment's overall financial efficiency, along with an introduction to Integrated Curriculum Financial Planning (ICFP).

Course Content

By the end of the course participants will be able to:

- Explain what financial benchmarking and ICFP are
- Summarise why benchmarking and ICFP are an integral part of the financial planning process
- Recognise the context and risks associated with benchmarking and ICFP
- Carry out benchmarking activities within your own school's metrics
- Clarify the next steps you will take with regards to benchmarking & ICFP

Suitability

This course is suitable for existing finance staff who have been in post for at least 6 months.

Norfolk local authority maintained schools.

Audience

Finance staff, headteachers and governors.

Important information

This is an eLearning course accessed through myOracle.

Income Generation

Raising additional income is essential to enhancing and widening the educational opportunities available to pupils.

Course Outline

This course outlines the techniques required to establish an income generation strategy and identifies and evaluates additional sources of income for educational establishments.

Course Content

By the end of the course participants will be able to:

- Identify how income can be increased to enhance learning opportunities
- Compile an income-generation or fund-raising strategy
- Define and evaluate potential income sources
- Recognise techniques to compose a successful funding bid

Suitability

This course is suitable for existing finance staff that have been in post for at least 6 months.

Norfolk local authority maintained schools.

Audience

Finance staff, headteachers and governors.

Important information

This is a classroom based, tutor led course booked through SLA Online.

Capital Funding

An introduction to capital funding and spending in Norfolk LA maintained schools.

Course Outline

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

Course Content

By the end of the course participants will be able to:

- Identify and monitor capital funds
- Understand the assessment of capital spending priorities
- Identify the different types of capital funding available
- Understand the process by which schools apply to spend capital funds

Suitability

This course is suitable for existing finance staff that have been in post for at least 6 months.

Norfolk local authority maintained schools only (including VA & VC schools).

Audience

Finance staff, headteachers and governors.

Important information

This is an eLearning course accessed through myOracle.

Electronic Payments (BACS)

Schools can use Star Accounts to process electronic (BACS) payments.

Course Outline

This course looks at how to use Star Accounts to process BACS payments to suppliers, as a cost effective alternative to using cheques.

Course Content

By the end of the course participants will be able to:

- Switch on the BACS function in Star Accounts
- Process BACS payments to suppliers
- Reconcile BACS transactions at the end of the month

Suitability

This course is suitable for new and existing finance staff.

Norfolk local authority maintained schools only.

Audience

Finance staff and headteachers.

Important information

This is an eLearning course accessed through myOracle.

Finance and Star Accounts Refresher

Update and enhance existing school finance and Star Accounts knowledge, review latest news, and share best practice.

Course Outline

This course has been designed as a refresher for elements of finance and Star Accounts. Highly interactive with the emphasis on asking questions and knowledge sharing, including any operational implications of the content of the most recent Headteacher Refresher course.

Course Content

The objectives of this course include:

- Review, revisit and refresh specific financial processes
- The latest news and updates around schools finance
- Discuss and answer delegate questions
- Share best practice

Suitability

This course is suitable for existing finance staff that have been in post for at least 6 months.

Norfolk local authority maintained schools only.

Audience

Finance staff.

Important information

This course consists of a live online webinar session booked through SLA Online.

Finance in Education

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

Outline

It is more important than ever for finance professionals working within educational establishments to further develop their business, finance, and accountancy skills. With the increasing pressure to provide value for money in a fast-paced environment, finance professionals need to support the headteacher and leadership teams and the drive to achieve educational goals.

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 finances within schools, academies, multi-academy trusts and free schools.

Qualification Levels

Bookkeeping in Educational Establishments – Level 2

Administering Finance in Education – Level 3

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

To find out further details about our Finance in Education Qualifications, please contact us on 01603 306407 or financequalifications@norfolk.gov.uk

Bookkeeping in Educational Establishments

A comprehensive 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, or have recently changed to, academy status.

Outcome

Once you have completed your studies you will be ready to take your assessment.

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

Phase

Local authority maintained schools and academies.

Audience

Finance staff and business managers.

Study Time

Approximately 50 hours self-study.

Format

This is an online self-study course.

Cost

£200 per delegate including assessment.

Administering Finance in Education

In this Level 3 national qualification you'll master day-to-day accountancy processes whilst making a significant contribution towards the achievement of your establishment's educational goals.

Complete Learning Package

Using the experience of our professional training team, we have developed a comprehensive learning package to help you quickly gain the knowledge and skills required to pass the Administering Finance in Education qualification.

Course Content

There are 7 mandatory units within this qualification, all of which are focussed on educational establishments:

- Bookkeeping
- VAT
- Costing
- Preparing Financial Accounts
- Budgeting
- Procurement
- Internal Control Systems

Phase

Local authority maintained schools and academies.

Audience

Finance staff and business managers.

Study Time

Approximately 180 hours self-study.

Format

This is an online self-study course.

Cost

£1,250 per delegate including assessment.

RAG 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 appropriate support is made available to headteachers and governors as required. It is prepared termly by the finance team and contains a series of financial management criteria to be met, including training.

New Finance Staff

It is important that new finance staff are able to gain the skills and knowledge needed to operate the school finances quickly. New, un-trained finance staff can pose a significant risk to the management of the school budget and decision-making.

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

No courses completed – Red rating

Induction session with Education Finance team only completed – Amber 1 rating

Introduction to School Finance course only completed – Amber 2 rating

All **New to Finance courses** completed – Green rating

New to Finance courses are:

- Introduction to School Finance
- Introduction to Star Accounts
- Star Accounts Foundation (Purchasing & Expenditure, Income & Banking and Month End)
- Fighting Financial Fraud

Existing Finance Staff

For the RAG Matrix, existing finance staff (that have been in post for at least one year) will be expected to keep updated on their finance knowledge and skills by completing a defined number of courses during a rolling 12-month period.

The number completed will determine the RAG rating:

No courses completed – Red rating

One course only completed – Amber 1 rating

Two courses completed – Amber 2 rating

Three or more courses completed – Green rating

All the courses within this brochure count towards the RAG Matrix but there are additional options available. Finance staff can also attend/complete any of the following:

- Any relevant course listed in the Headteacher and Governor brochures
- Level 2 Award in Bookkeeping in Educational Establishments qualification
- Level 3 Certificate in Administering Finance in Education qualification
- Budget Workshop (Standard support schools only)
- Attendance at a finance support officer budget visit (Enhanced support schools – max 2 per 12 month period, Standard support schools max 1 per 12 month period)
- Other ad-hoc finance briefing/event held by the Finance team – eligible events will be notified to schools

In addition to the above, any relevant **financial** training course provided by a recognised third party provider may count towards the RAG. You will need to provide evidence of the course attended to finance.support@norfolk.gov.uk for consideration.

Some of our webinar sessions are recorded – watching any available recorded sessions will also count towards the RAG. Details on how you can provide evidence for RAG purposes can be found within each recording. Available recordings will be advertised via the regular Finance Focus newsletter produced by the Education Finance team.

Course Schedule

This is the full schedule for classroom based and online webinar sessions for the 2023 – 24 academic year (includes courses relevant to headteachers and governors).

Classroom sessions will be held at the **Henderson Business Centre, 51 Ivy Road Norwich NR5 8BF**. Details on how to access the webinar sessions will be sent via email to all delegates ahead of each session.

Course Title	Date	Time	Course Type
Autumn Term 23			
Star Accounts Foundation Purchasing & Expenditure	13/09/2023	10am -11.30am	Webinar
Star Accounts Foundation Income & Banking	20/09/2023	10am -11.30am	Webinar
Star Accounts Foundation Month End	27/09/2023	10am -11.30am	Webinar
Star Accounts Foundation – Full Course	11/10/2023	9.30am – 1pm	Classroom
Effective Budget Monitoring	18/10/2022	9.15am -12.15pm	Classroom
Governor Finance Refresher	02/11/2023	10am - 11am	Webinar
Headteacher Refresher	08/11/2023	10am – 11am	Webinar
Finance & Star Refresher	16/11/2023	10am – 11am	Webinar
Fighting Financial Fraud	22/11/2023	9.15am -12.15pm	Classroom
Income Generation	30/11/2023	9.15am -12.15pm	Classroom
Effective Budget Monitoring	05/12/2023	10am -11.30am	Webinar
Spring Term 24			
Star Foundation – Purchasing & Expenditure	10/01/2024	10am -11.30am	Webinar
Star Foundation – Income & Banking	17/01/2024	10am -11.30am	Webinar

Star Foundation – Month End	24/01/2024	10am -11.30am	Webinar
Budget Setting	31/01/2024	9.15am -12.15pm	Classroom
Budgeting for Governors	07/02/2024	9.15am -12.15pm	Classroom
Effective Budget Monitoring	08/02/2024	10am -11.30am	Webinar
Headteacher Refresher	13/02/2024	10am -11am	Webinar
Year End in Star Accounts	26/02/2024	10am -11.30am	Webinar
Year End in Star Accounts	27/02/2024	10am -11.30am	Webinar
Year End in Star Accounts (new starters/first timers)	28/02/2024	9.30am -12.15pm	Classroom
Year End in Star Accounts	29/02/2024	10am -11.30am	Webinar
Finance & Star Refresher	14/03/2024	10am – 11am	Webinar
Fighting Financial Fraud	20/03/2024	10am -11.30am	Webinar
Summer Term 24			
Star Foundation – Purchasing & Expenditure	23/04/2024	10am -11.30am	Webinar
Star Foundation – Income & Banking	30/04/2024	10am -11.30am	Webinar
Star Foundation – Month End	07/05/2024	10am -11.30am	Webinar
Effective Budget Monitoring	15/05/2024	9.15am -12.15pm	Classroom
Governor Finance Refresher	23/05/2024	10am -11am	Webinar
Headteacher Refresher	06/06/2024	10am -11am	Webinar
Finance & Star Refresher	12/06/2024	10am -11am	Webinar
Income Generation	26/06/2024	9.15am -12.15pm	Classroom

Effective Budget Monitoring	04/07/2024	10am -11.30am	Webinar
Fighting Financial Fraud	09/07/2024	10am -11.30am	Webinar

Details correct at time of publication (July 2023)

Cancellation Policy

All cancellations must be made through SLA Online or via email to landitraining@norfolk.gov.uk or finance.training@norfolk.gov.uk

Cancellations received within 3 working days of the course or failure to cancel/failure to attend, will be subject to an administration charge of £50.

For example, if the course is due to take place at 9am on Wednesday, cancellation will need to have been received at the latest by 9am on the preceding Friday to avoid the administration charge being levied.

The charge will be added to the next available download and will be described as 'Course cancellation – [delegate name]'

We will do our very best to ensure that every course date set is delivered but please be aware that a course may not run below the minimum number of 5 delegates, or due to unforeseen circumstances.

In the event of a course being cancelled you will be contacted at the earliest opportunity and offered an alternative date where possible.

The Cancellation policy applies to both classroom and webinar sessions.