



SBS Financial Planner case study **Attenborough Learning Trust**

Attenborough Learning Trust is a multi-academy trust in Leicester, launched in April 2019 with four schools. The trust has grown rapidly in the past two years and now numbers nine schools across the city.

Soon after the trust was established a decision was made to replace budget management systems inherited from the local authority. After a competitive tender School Business Services' SBS Financial Planner – a budgeting tool which helps multi-academy trusts streamline financial planning, simplify complex budgeting and make the most of funding – was chosen.

Schools are responsible for monthly invoices and their own payroll but a central service team, which includes Finance Manager Tom Bott, sets the strategic direction.

Tom explains:

"I will set budget assumptions centrally, including the budget for pay awards, and make sure that everyone's on the same path when they're putting together their school budgets, which they build using SBS Financial Planner."

Once this process is complete the school budgets go to local governing bodies and then the trust resources committee. "We'll then we'll create an in-year budget, which we'll match throughout the year for payroll," Tom explains. "SBS Financial Planner is a good tool for payroll tracking and will pick up errors where we've over or under budgeted."

Trust-level access to SBS Financial Planner means that the trust's central team can monitor school budgets throughout the year, with any errors quickly picked up and resolved. "Not all business managers are finance people," says Tom. "Many have different strengths in areas such as HR or people management, so having that access and control reassures them and me as well."

Tom and his team have been pleased with how SBS Financial Planner has integrated with the trust's payroll systems. The trust moved to Dataplan's Iris Payroll and the systems are working smoothly together after initial teething issues.

"The fact that they we're still using it and we've not felt like we needed to replace it as we've grown and evolved is proof that it works," says Tom.

Simplicity, accessibility and smooth integration with other systems are key benefits of the SBS Financial Planner system, says Tom. "The process of uploading the budget from SBS Financial Planner to our IRIS Financials software is simple. Once that's done that's the basis for our whole year's finance.

"Being able to profile our budgets by equal 12s or set up our own profiles for areas such as catering where we don't have costs in much of July and all of August, makes it easier so that month by month, we can make sure our accounts are accurate."

SBS Financial Planner's trust management features also come in for praise.

"The fact that we don't have to go into 10 separate budgets and update NI rates or pay scales and can do it centrally is great," Tom says. "I also like the trust level overview, which gives us reporting outputs which can be used for presentations to our governors."



Customer service is another plus point for Attenborough Learning Trust. "If you ring the support desk a human will pick up the phone, you get immediate feedback and an immediate answer," says Tom. "The guys at SBS are pretty knowledgeable – I've never had a situation where a problem hasn't been sorted."

He adds:

"I'd absolutely recommend the system to other trusts. It is good value and with the link to IRIS Financials we have a clear picture at the beginning and throughout the financial year which underpins our budget processing.

"Like the plumbing it just works in the background. It's not something you notice unless it goes wrong, and we haven't had any issues with this system. Everyone's happy."

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