



SBS Financial Planner case study **Fielding Primary School**

Fielding Primary School is a maintained school in the London Borough of Ealing. It is a four-form entry primary school with 1,016 pupils and 132 staff..

Accurate budget monitoring and forecasting, plus responsive customer service is vital for Finance Manager Jane Peterson and her team, and the school found their previous budget software limited from a reporting perspective.

Fielding moved to SBS Financial Planner – a budgeting tool which helps maintained schools and multi-academy trusts streamline financial planning, simplify complex budgeting and funding formulas – two years ago.

Finance Manager Jane Peterson said: "I found our previous system to be antiquated and hard to navigate. Even a straightforward task such as adding a new ledger code was a challenge. Customer service was also not responsive enough for us".

"For a school this size it just did not meet our needs. Our payroll costs are significant and the previous system also didn't facilitate payroll reconciliations."

A decision was made to find a new system and SBS emerged the winner from the tender process. Jane was aware that a number of other schools in the borough were also using SBS Financial Planner, which gave her the confidence that the system would work alongside local authority reporting requirements.

She says that her initial positivity about the system has been justified over the past two years.

"Setting the budget is a much more seamless procedure now," she says. "The big win is being able to produce payroll reconciliations and having confidence in the accuracy of our data."

SBS's customer service comes in for special praise from Jane. "The response time is rapid and incredibly responsive," she says. "This is critical for us, especially around reporting deadline periods and year end."

Jane has yet to use SBS Financial Planner's new Integrated Curriculum Financial Planning (ICFP) tool, but it is something she is seriously considering.

"I like the fact that SBS now offers an ICFP tool, which works alongside SBS Financial Planner, but I'm still working out how we will use this functionality," she says.

"I'm looking forward to exploring this further in training sessions being offered by SBS. When I'm up-to-speed I am sure it will enhance our reporting and decision making."

For Jane, knowing that her budget is accurate is the most important consideration, and SBS Financial Planner gives her that confidence.

"The accuracy of SBS Financial Planner means that I have faith in our forecast throughout the year".



Jane says she would recommend SBS Financial Planner to other schools "without reservation". She says:

"I'm not sure there is another system that matches SBS' value for money, alongside the efficiency and support of the SBS team."

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