



School Business Services Finance Training Catalogue



New Finance Officer Induction

RM System training – Group or Individual

FMS System training – Group or Individual

Course contents

To provide the theory and practical knowledge of the Finance Officers role and responsibilities in the school including the reporting requirements by the Governors and the LA. To give examples of best practice and requirements by Audit. Explanation of school funding and other sources of income, including an understanding of how education finance works. To enable schools' finance staff to use RM software comprehensively, to ensure that the schools' accounts are maintained and reported on correctly to Governors and the LA.

To provide the theory of Consistent Financial Reporting and the importance of accuracy within the schools' accounts. To cover the monthly procedures and reporting required of a Finance Officer.

- General Ledger
- Income
- Budget Maintenance
- Reports
- Personnel Links (FMS)
- Salary Reconciliation (FMS)

Duration: 2 day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

RM Finance & Procedures Refresher Training

Group Training

Course contents

To cover full functionality of RM Finance and refresh the user on the benefits of the system and the updated functions. To cover the monthly procedures required of a Finance Officer and give advice regarding best practice and reporting to the LEA.

Duration: 1 day course

Speak to a training advisor on **0345 222 1551** for further details. Prices available upon request

FMS & Procedure Refresher Training

Group Training

Course contents

To cover full functionality of FMS and refresh the user on the benefits of the system and the updated functions.

Duration: 1 day course

Speak to a training advisor on **0345 222 1551** for further details. Prices available upon request

Bid Writing Workshop

Course will cover

- Things to consider before applying
- Preparation Checklist
- Benefits to the school
- Following Guidelines
- Selling your project

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

FMS Accounts Receivable

Course contents

Delegates will obtain the skills and knowledge to set up and run the system efficiently.

- Setup Products
- Create Invoices
- Record Receipts
- Report on Debtor situations

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

FMS User Defined Reports

Course contents

Delegates will be able to:

- Create their own user defined reports
- Maintain existing reports
- Export outputs to another software package

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

Business Continuity Planning

Course Contents

A business continuity or disaster recovery plan sets out how a school would cope if some disaster happened. Training will cover

- Identifying premises that could be used if the school's
- own premises became unavailable for an extended period
- Asset management for insurance purposes, so equipment is not vulnerable to a disaster in the school
- Obtaining adequate insurance for premises and contents
- Daily backing up off-site of the school's important IT systems
- Contingencies for significant simultaneous absence of staff
- Individual schools may be aware of additional local hazards too.

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

Financial Benchmarking

Course contents

The Benchmarking training is based on your schools actual financial data. We will show you how to analyse and make comparisons, which will improve and develop the following areas that the course will cover:

- Focus on planning and managing your budget;
- Identifying areas for improvement;
- Setting targets for improvement;
- Achieve best value – Quality vs. Cost
- Achieve value for money – Quality vs. Cost;
- Improve the effectiveness of your expenditure to improve performance and deliver educational services to a defined standard.

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

Academy Conversion Workshop

Course Contents

To provide school with information regarding the process.

The course will cover:

- What to consider before making your application
- What are the legal implications
- What are the financial implications
- What are the staffing implications
- What policies will you need to have in place.

Duration: 1 day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

FMS Equipment Register

Course will cover:

- Setup Equipment Register including users and system parameters
- Populate the Register via excel, FMS or manual entry
- Locate and Relocate Equipment
- Allocating Staff Responsible and changing Responsibilities
- Setup and run Equipment Inspections
- Setup and run a Stock Take
- Record the disposal of equipment
- Analyse the equipment using the various report available

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

FMS Top Tips & Techniques

Course will cover:

- General Information
- Accounts Payable
- General Ledger
- Tools
- Non-Invoiced Income
- Personnel Links
- New Year/Year End
- CFR
- Reports – User Defined Reports
- Reports – Useful Reports
- Reports – General Information
- Accounts Receivable – Invoiced Income
- Equipment Register

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

FMS End Of Year

Course will cover:

- Orders and commitments
- Invoices and Credit Notes
- Reconciliation – to the LEA and the Bank
- Petty Cash, Income, Journals
- Fund Balances and carry forward figures
- The New Year Chart of Accounts
- Salary commitments
- Automatic Reconciliation (if used)
- Year End Balances

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

FMS Year End with CFR Reporting

Course will cover:

- Review outstanding transactions
- Create the new financial year
- Update general ledger structures
- Prepare creditors and debtors
- Reconcile figures
- Perform preliminary and final closures
- Transfer/Check balances
- Produce year end reports
- Produce the CFR if appropriate

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

Deficit Recovery Planning

Course Contents

To provide training on how to create a deficit recover plan.

Course will cover:

- Maximising income generation
- Review of efficient use of resources
- Cross year planning
- Strategies for long term financial planning
- Use of online tools such as benchmarking, pupil premium calculator

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

RM Finance Year End

Course will cover:

- Creditors
- Debtors
- Prepayments
- Advances
- Outstanding Commitments
- Payroll Control
- Year End Bank Reconciliation
- Reconciliation of the VAT Control Accounts
- Completion of LA Returns

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

RM Finance Year End With CFR Reporting

Course will cover:

- Accruals
- Outstanding Commitments
- Payroll Control
- Year End Bank Reconciliation
- Reconciliation of the VAT Control Accounts
- Completion of LA Returns
- Linking RM Finance to CFR Assistant

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

RM Finance Month End for Bournemouth Schools

Course will cover:

- Bank, Charge Card and Petty Cash Reconciliation
- Correcting Transactions
- Reports
- VAT Return
- Period End Closedown
- Returns to LA

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

RM Finance Year End CFR Return Workshop

Course will cover:

- Introduction to CFR Assistant
- Settings
- Completing the return manually or linking it to RM Finance for importing
- CFR Validation
- Interim CFR Return
- Final CFR Return
- Reports and Benchmarking

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

Budget Monitoring and Reporting to Governors (SBM and HT)

Course will cover:

- Introduction to budget monitoring
- The importance of setting fixed and current budgets
- Analysing current financial positions and projecting over and under spends
- Including accurate staffing projections for financial year end
- Monitoring specific funding streams
- Effective budget monitor structure

Duration: ½ day course

Speak to a training advisor on **0345 222 1551** for further details. Prices available upon request

FMS Budget Management

The course will cover how to:

- modify the chart of accounts
- allocate Budget to cost centres/ledger codes
- understand Personnel links and Salary Projections
- produce reports for budget monitoring

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

School Financial Value Standards for School Business Managers

This session is aimed at School Business Managers, who are involved in the recording and reporting of the School Financial Value Standards (SFVS).

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
for further details. Prices available upon request

School Financial Value Standards for Leadership & Governors

This session is aimed at School Business Managers, who are involved in the recording and reporting of the School Financial Value Standards (SFVS).

Duration: ½ day course

Speak to a training advisor on **0345 222 1551** for further details. Prices available upon request

Academy Financial Returns

Course will cover:

- Introduction to the returns required by the Department and the time scale in which they need to be submitted
- Budget Forecast Return
- Funding Factors and Pupil Number Returns
- Accounts Return
- Audited Financial Statements
- Value for Money Statement

Duration: ½ day course

Speak to a training advisor on **0345 222 1551** for further details. Prices available upon request

Academy Annual Returns

During the course you will gain an understanding of the Department's requirements and gain practical experience in producing a set of Accounts and completing the Department's annual return.

Course will cover:

- Understand the Department for Education's requirements in relation to financial compliance
- Understand the structure of the Annual Report and Accounts produced to standards set within the Charity Commission's Statement of Recommended Practice (SOPR)
- Understand who is responsible for producing elements of the Annual Report and Accounts

Duration: ½ day course

Speak to a training advisor on **0345 222 1551**
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Multiple Delegates attending the same course on the same day receive a **10% discount** on the course cost.

Early Booking Discount of 10% for all booking forms received 4 weeks before the course.

All of the above courses can also be offered on a one to one or group basis on your school premises, please contact us for further details.

To reserve a space on any of these courses please complete this [Booking Form](#)

Next steps

Get in touch today to discuss how SBS can teach you the skills needed to improve your school.

Turn our experience into your expertise.
[schoolbusinessservices.co.uk/training](https://www.schoolbusinessservices.co.uk/training)

Speak to a training advisor
0345 222 1551
