

Sutton Primary School uncovers £34k refurbishment fund as a result of precise budgeting tool



School Profile

Name

Culvers House Primary School

School Category

Maintained

School type

Primary

Pupil roll

394

Age range of pupils

2 to 11

LA

Sutton, London

“I feel so much more confident now when presenting a budget. I love this package; it is money well spent!”

Marilyn Growns

School Business Manager/Finance Manager

Culvers House Primary and Nursery School has achieved dramatic improvements in the children’s progress and results.

The school’s most recent Ofsted visit earned a ‘Good School’ grading with ‘Outstanding’ for behaviour and safety. Culvers House has recently increased its intake with the addition of children aged two.

Teachers and support staff have a culture of high expectations. Each class is named after a university because Culvers House believes every pupil should be equipped to progress to Higher Education. Use of the International Primary Curriculum ensures children develop a real love of learning.

Culvers House provides a vast range of clubs and extra-curricular activities. Involvement in sporting competitions across the borough and beyond is led by the borough’s ‘Sports Teacher of the Year’ for 2012. In addition, the school operates a full wrap around service for its nursery, a breakfast club, a newly opened two year old provision and an outsourced after school club both of which have access to a recently developed play area.

School’s objectives

The SBM at Culvers House has always used spreadsheets to set the school budget and track expenditure along with its school management system. The finance team had not received training for advanced Excel functions, so the use of macros, complex formulae and linking worksheets was self-taught.

Due to limitation of locking down sections of the workbooks, there were often inaccuracies in the data that were increasingly difficult to locate. As a result, the SBM did not feel fully confident in using Excel for producing the school budget or making decisions based on the information.

System setup & training

The SBS team liaised with the SBM to gather all relevant data to build the budget planner ahead of training. The business manager participated in two class-based training sessions, each lasting one day, along with fellow business managers from Sutton schools. The first session focused on planner settings, budget building, workforce creation and reporting.

The second session concentrated on salary and budget monitoring for accurate and early projection of year-end financial position. All participants were able to work on their own planners and live data.

Following initial training, Marilyn opted for additional one to one support to review the current and future school budget plan, to ensure an even better and fuller understanding of the SBS package.



“With SBS Online being web-based it enables access to the budget immediately from home or on the move and I can update when I remember things.

I am very happy with the help I have had. The team are very knowledgeable, which gives me confidence.”

Marilyn Grows

School Business Manager/Finance Manager

How SBS Online helped

The initial implementation of SBS Online budget planning and monitoring software enabled Culvers House to easily create a number of scenario budgets. Rather than manage multiple spreadsheets and tabs with ever-increasing versions, the finance team set up “what if” scenarios within the software for staffing structures and internal projects without affecting the agreed school budget.

The business manager was able to have complete peace of mind that the majority of school expenditure, e.g. staff expenses, was accurate through use of the salary monitor. By importing the monthly payroll file the team was able to identify any discrepancies, and either correct the staffing contract in SBS Online to project an accurate forecast, or advise payroll of an incorrect transaction.

The easy-to-use interface allowed for quick updates to the staffing contracts or budget-specific settings from multiple devices in remote or on-site locations. Reports were updated dynamically enabling the school to immediately see the impact of any changes and even compare budgets to one another, reporting on variances by value and percentage.

Impact

The impact on the school has been immediate. Marilyn commented, “I still cannot believe how healthy the budget is. I feel so much more confident. The one-to-one support I bought was very helpful.”

As a result, Culvers House Primary School was able to put the additional funds to good use immediately, assigning £34K of their delegated budget to a toilet refurbishment and other plumbing issues to improve health and safety for the pupils.

Next steps

Culvers House Primary School will continue to utilise SBS Online to further improve the budget management process, maintain confidence and ensure all available funds are put to effective use.

The business manager already has plans to investigate alternative staffing structures for both support and teaching staff to get the most out of her budget, whilst ensuring the best possible environment to enhance Teaching and Learning for all pupils.

The business manager is looking forward to improved reporting to governors using more of the system features, such as a custom reporting format and the use of analysis tags to show plans for specific ring-fenced funds.

To find out more about SBS Online, contact the team on **0345 222 1551 • Option 5** or email sales@schoolbusinessservices.co.uk

www.schoolbusinessservices.co.uk