

George Mitchell School reaps rewards from time-saving budgeting software



School Profile

Name

George Mitchell School

School Category

Maintained

School type

All-through

Pupil roll

980

Age range of pupils

3 to 16

LA

Waltham Forest, London

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John Lawrence

School Business Manager

George Mitchell School is an all-through school based in Leyton in London with just under 1,000 students from nursery age to year 11.

School Business Manager, John Lawrence, acquired SBS Online in early 2015 to help him plan his budget more accurately. Before this time, he was using spreadsheets to plan and monitor his budget and salaries.

SBS Online setup

The first step was to set up George Mitchell School’s planner. Following an initial consultation with John to take on board any specific requirements around his budget structure, the SBS Online team imported his chart of accounts, staff contracts and non-staffing income and expenditure. This was completed in time for training to take place.

Group training

Training was undertaken in a small group with two other customers over the course of two days. The first day dealt with how the software works, establishing the correct settings, checking contract forecasts and non-staffing figures. This ensured that by the end of the first day’s training, John had an accurate, fully working budget in his planner, in itself a time-saving measure.

This also meant that the training could be carried out using real data from his school. For this reason, the training was relevant and contextualised and any questions asked were based on real scenarios.

The second day of training took place a few weeks later which gave John chance to use the software in the intervening period and put into practice the things he learned from day one. The second session covered salary monitoring and budget monitoring. The salary monitor was also used to double-check the accuracy of contracts, especially based on any changes that had been made since setup.

John found this process to be very effective. *“The training was very good in a small group with other SBMs. It was really useful to talk to other colleagues about the particular way they budget.”*

After-care

Even though SBS had fulfilled its training commitments, the support continued afterwards. George Mitchell School was assigned a dedicated consultant, Simone, to oversee the immediate period of time following the training. This was to ensure that any queries were answered quickly. “Simone is very patient and very helpful.” John also has unlimited access to the Service Desk which he can use to resolve any queries he has.



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John Lawrence
 School Business Manager

Impact

There were several immediate benefits of using SBS Online for budget planning. *“The whole budget planning process is more straightforward,”* John said. *“By putting in the detailed budget tree information, it allows for forecasting that is much more accurate and appropriate.”*

John found that producing reports for the local authority and for governors became a much easier process. He could export the reports from SBS Online and quickly use them to fill in the relevant documentation required by the local authority. For governors, he was able to export the SBS Online reports straight to PDF and present them.

“I used to spend at least half a day chopping up data from my finance software. Using SBS Online, it’s a two second job to report to the senior leadership team and to budget holders. I can produce a report for the local authority and I can budget monitor based on CFR codes which gives me a much better feel for year end. I also like the curriculum report. It’s nice and neat and is much better presented than my finance software, and in general the PDF reports look professional compared to spreadsheets.”

John uses the salary monitor to check his monthly payroll against the contract information held in SBS Online. *“I have a much greater degree of confidence. National Insurance, superannuation and increases to pay are correct. I was never that confident in my finance software, but the expected amounts in SBS Online match my payroll file. The salary statements have already proved useful. To be able to produce one almost immediately is such a simple process.”*

Summary

John admits that he was apprehensive at first about changing his systems and processes, but is happy he did. *“I didn’t know what to expect. The journey and process has taken some investment in time but has resulted in much more confidence in my salary forecasting and reporting which is much clearer and easier to produce than cutting and pasting rows in Excel.”*

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