

Finance Training
Headteacher Training

Sept 2024 – July 2025

# Welcome

This training programme has been specifically designed to provide headteachers, deputies and aspiring leaders with the financial skills and knowledge needed to manage finances effectively within schools.

The training team has developed the Headteacher training programme to offer online material and resources, including eLearning courses and short video presentations along with live classroom based and online webinar sessions.

Booking Information can be found on <u>Page 4</u> and further information about the link between training and the Finance RAG Matrix for new and existing headteachers of **Norfolk LA maintained schools only** can be found on <u>pages 25 & 26</u>

All scheduled courses (including online), eLearning courses, support materials and resources are provided at no additional cost if your school has purchased a finance support or training package for the current year (unless otherwise stated).

If your school hasn't purchased a finance support or training package, then please contact us for further details.

On the next few pages, you will find a list of all the courses in the programme with direct links to the detailed course pages.

A full schedule of classroom based and online webinar sessions can be found on <a href="Pages 27">Pages 27</a>, 28 & 29

Details of our cancellation policy can be found on <a href="Page 29">Page 29</a>

Further information can be found by contacting us on 01603 306407, via email <a href="mailto:finance.training@norfolk.gov.uk">finance.training@norfolk.gov.uk</a> or via our website [Norfolk Schools] - Finance <a href="mailto:Training">Training (opens in a new window)</a>

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# Bookings

Our finance courses can be booked and accessed in the following ways:

## Webinar and Classroom sessions

Places on webinar sessions (including individual) and classroom based, tutor led sessions can be booked via our online booking portal, SLA Online [SLA Online] Main Page (opens in a new window).

Dates and times for all sessions can be found on SLA Online – **details of individual** sessions will be advised separately.

You will be provided with details via email on how to access the standard webinar sessions ahead of the scheduled/advised delivery date and time.

All information regarding course bookings will be sent to the email address used on the initial booking so please make sure that it is correct and that our email address, finance.training@norfolk.gov.uk, is added to your 'safe senders' list so that you can succesfully receive our emails.

## **eLearning Courses and Online Resources**

Our eLearning courses, video presentations and online resources are accessed via NCC's HR and learning management system, myOracle.

If you are struggling to access the myOracle system, please contact the HR advice and support team on **ehrenquiries@norfolk.gov.uk** or 01603 307760.

If you can access the system but are struggling to find our courses, in the first instance please try using the search term **Education Finance** - all of our courses should then appear. If you still encounter any issues, please contact the training team on <a href="mailto:finance.training@norfolk.gov.uk">finance.training@norfolk.gov.uk</a> or 01603 306407

## **Finance in Education Qualifications**

The Finance in Education qualifications can be booked by visiting our website [Norfolk Schools] - Finance in Education qualifications (opens in a new window

## **Headteacher Skills Toolkit**

Effective management of school finances is a crucial part of a school leader's role; it enables the school to remain financially robust and healthy and achieve its educational aspirations. This takes specific knowledge and skills.

#### **Course Outline**

This toolkit aims to support you in acquiring, developing and applying your finance knowledge and skills.

#### **Course Content**

The toolkit is broken down into two parts:

- 1. A self-assessment which asks you to evaluate your knowledge and skills against a series of competency statements; followed by
- 2. A learning path which provides a selection of learning interventions that can help with the acquisition, development and application of the identified knowledge and skills.

## **Suitability**

The toolkit is suitable for all existing headteachers, and is highly recommended for new, deputy, assistant or aspiring headteachers.

Norfolk local authority maintained schools only.

#### **Audience**

Headteachers.

### **Important Information**

This is a downloadable self-assessment toolkit accessed through myOracle.

## Introduction to School Finance

An introduction to key financial processes that exist within educational establishments.

#### **Course Outline**

This course provides an overview of school finance from funding through to budgeting and protecting public money – a great starting point for those who are new to school finances.

#### **Course Content**

| By the end of the course, participants will be ab |
|---|
|---|

| Describe the responsibilities of finance staff, headteachers and governors for finances in schools |
|--|
| Identify the steps involved in setting a budget for the financial year                             |
| Review reports used for monitoring the budget  |
| Identify key financial controls in place to protect public money                                   |

## **Suitability**

This course is essential for all new headteachers as a pre-requisite for further training.

Norfolk local authority maintained schools only.

#### **Audience**

Headteachers, finance staff and governors.

### **Important Information**

This is an eLearning course accessed through myOracle. Click on the link to access the course [myOracle] Education Finance - Introduction to School Finance (opens in a new window)

## Introduction to Star Accounts – Web Based

An introduction to the web based financial software used in Norfolk local authority maintained schools.

#### **Course Outline**

The course provides an overview of the basic day-to-day functionality of Star Accounts.

## **Course Content**

| By the end of the course, participants will gain an understanding of: |                                 |
|---|---------------------------------|
|   | Basic Structure of the system   |
|   | User Access and Passwords       |
|   | Navigating the system           |
|   | Other functionality             |
|   | Important system considerations |

## **Suitability**

Although primarily aimed at finance staff and business managers who use the Star Accounts system, it is recommended learning for all new and existing headteachers in order to understand the finance system used in their school(s).

Norfolk local authority maintained schools only.

#### **Audience**

Headteachers, finance staff and governors.

## **Important Information**

This is an eLearning course accessed through myOracle. Click on this link to access the course [myOracle] Education Finance - Introduction to Star Accounts - Web based (opens in a new window)

# **Budget Setting**

A robust and substantive budget is the foundation of sound financial management.

#### **Course Outline**

This course outlines the budget setting process, identifying the information available to enable the construction of a robust and substantive budget.

#### **Course Content**

| By the end of the full course package, participants will be able to: |   |  |
|--|---|--|
|  | Identifying the information that is needed in setting a budget                    |  |
|  | Explain why setting an accurate budget is important to educational establishments |  |
|  | Understand how budgets are constructed in an educational establishment            |  |
|  | Identify the documentation used when setting a budget                             |  |

## **Suitability**

This course is suitable for all new and existing headteachers.

Norfolk local authority maintained schools and academies.

#### **Audience**

Headteachers and finance staff.

## **Important Information**

This course consists of an eLearning course (Budget Setting) with two additional short video presentations (Budget Share and Financial Coding for LA Maintained Schools) accessed through myOracle by clicking on this link [myOracle] Education Finance - Budget Setting (opens in a new window) or alternatively a classroom based tutor led session booked through SLA Online. In order to register full course completion you will need to complete the 2 video presentations and either the eLearning or classroom based session.

# **Effective Budget Monitoring**

Keeping control of the budget is an important aspect of successful financial management.

#### **Course Outline**

This course explores effective budget monitoring practices used by educational establishments, from budget profiling through to identifying budget variances.

#### **Course Content**

| By the end of the full course package, participants will gain an understanding of: |  |  |
|--|--|--|
|  | The principles of budget control                                     |  |
|  | The impact of budget profiling                                       |  |
|  | How to use reports to identify budget variances                      |  |
|  | Analysing and identifying appropriate actions to deal with variances |  |

## Suitability

This course is ideal for new and existing headteachers.

Norfolk local authority maintained schools.

#### **Audience**

Headteachers, finance staff and governors.

### Important information

This course consists of two short video presentations (The Budget Cycle & Budget Outturn) accessed through myOracle by clicking on this link [myOracle] Education Finance - Effective Budget Monitoring (opens in a new window) and either a webinar session or alternatively a classroom based tutor led session booked through SLA Online. In addition it is essential that you complete the Staff Monitoring eLearning course that can also be accessed via myOracle by clicking on this link [myOracle] Education Finance - Staff Monitoring (opens in a new window). All elements must be completed to register full course completion.

## **Costing Development Plans and Initiatives**

Being able to calculate the cost of delivering an initiative accurately is an essential skill for those charged with financial management.

#### **Course Outline**

This course details how to interpret costing data to provide essential information in the decision-making processes of educational establishments.

#### **Course Content**

| By the end of the course, participants will gain an understanding of: |   |  |
|---|---|--|
|   | The costing information used in educational establishments                      |  |
|   | How to link the development plans to the production of realistic budget figures |  |
|   | Preparing full and accurate costing plans for initiatives and activities        |  |

## Suitability

This course is ideal for new and existing headteachers.

Norfolk local authority maintained schools.

#### **Audience**

Headteachers, finance staff and governors.

### Important information

This is an eLearning course accessed through myOracle. Click on the link to access the course [myOracle] Education Finance - Costing Development Plans & Initiatives (opens in a new window)

# Introduction to LA Budget Planner

How to use the LA Budget Planner Software.

#### **Course Outline**

This practical session is all about using the Budget Planner software to build and revise your school budget.

#### **Course Content**

| By the end of the course, participants will gain an understanding of: |  |  |
|---|--|--|
|   | Getting started with the Budget Planner Software                   |  |
|   | How to enter income and expenditure items                          |  |
|   | The staffing process   |  |
|   | How to use the pupil numbers forecasting tool to revise the budget |  |
|   |  |  |

### **Suitability**

This course is ideal for new and existing headteachers.

Norfolk local authority maintained schools only.

### **Audience**

Headteachers and finance staff.

## Important information

This is an individual webinar session delivered by the Finance Support Team. The date and time of your specific session will be advised after your place has been booked via SLA Online (please ignore the date quoted in SLA Online). Please note, priority may be given to people that have not already attended a session over the last year.

# **Staff Monitoring**

Staff monitoring is an essential part of effective financial management for any educational establishment.

#### **Course Outline**

This course is all about the effective and robust monitoring of staffing costs within schools.

#### **Course Content**

| By the end of the full course package, participants will gain an understanding of: |   |  |
|--|---|--|
|  | The importance of staff monitoring                                    |  |
|  | The impact of staffing on budget variances when monitoring the budget |  |
|  | The importance of future planning for staffing                        |  |
|  | How on-costs can impact on the staffing budget                        |  |
|  | The importance of good housekeeping in budget systems                 |  |

## Suitability

This course is ideal for new and existing headteachers.

Norfolk local authority maintained schools only.

### **Audience**

Headteachers and finance staff.

## Important information

This course consists of an eLearning course accessed through myOracle by clicking on this link [myOracle] Education Finance - Staff Monitoring (opens in a new window) and an individual webinar session booked through SLA Online and delivered by the Finance Support Team. The date and time of your specific webinar session will be advised after your place has been booked (ignore the date quoted in SLA Online) The eLearning course must be completed before you attend your individual webinar session. Please note priority may be given to people that have not already attended a session over the last year.

# **Fighting Financial Fraud**

Minimising the risk of fraud is crucial to the responsible management of public money.

#### **Course Outline**

This course is about how we need to be fully aware of the different types of threat and the necessary controls that must be in place to ensure the safety of public money.

#### **Course Content**

| By t | the end of the full course package, participants will gain an understanding of: |
|------|---|
|      | What fraud is   |
|      | The risks from possible sources of fraud  |
|      | How fraud can be detected   |
|      | Effective controls within the business  |
|      | The Whistleblowing process within your setting                                  |
|      | Distinguishing and addressing areas of weakness to improve existing controls    |

## **Suitability**

This course is suitable for new and existing headteachers.

Norfolk local authority maintained schools only.

#### **Audience**

Headteachers, finance staff and governors.

### Important information

This course consists of an eLearning course (Fraud Awaremes:Prevention & Detection) with an additional short video presentation (Whistleblowing) accessed through myOracle by clicking on this link <a href="[myOracle] Education Finance - Fighting Financial Fraud (opens in a new window) and">myOracle] Education Finance - Fighting Financial Fraud (opens in a new window) and</a> either a webinar session or alternatively a classroom based tutor led session booked through SLA Online. All elements must be completed to register full course completion.

# **Achieving Value for Money**

An in-depth look at the requirement for ensuring value for money within school expenditure.

#### **Course Outline**

This course is about how schools and academies can obtain best value with the resources available and follow rules, regulations and best practice relating to procurement.

#### **Course Content**

During this course participants will:

| <b>-</b> 4. | Samily and deared participants with                           |  |
|-------------|---|--|
|             | Learn what 'value for money' means                            |  |
|             | Explore 'economy'. 'efficiency' and 'effectiveness'           |  |
|             | Discover why achieving value for money is important           |  |
|             | Explore some of the strategic ways to achieve value for money |  |
|             | Learn the different steps within a typical procurement cycle  |  |

## **Suitability**

This course is suitable for new and existing headteachers.

Norfolk local authority maintained schools and academies

#### **Audience**

Headteachers, finance staff and governors.

### Important information

This course consists of two eLearning courses (Exploring Value for Money and A Strategic Approach to Achieving Value for Money) and a short video presentation (The Procurement Cycle) accessed through myOracle. Click on the link to access the course [myOracle] Education Finance - Achieving Value for Money (opens in a new window)

# Financial Benchmarking & ICFP

Carrying out benchmarking activities as part of an educational establishments annual planning cycle is a crucial mechanism to support robust financial health.

#### **Course Outline**

This course provides an overview of the benchmarking process and the value that it can add to an educational establishment's overall financial efficiency, along with an introduction to Integrated Curriculum Financial Planning (ICFP).

#### **Course Content**

| ву і | the end of the course participants will be able to:  |
|------|--|
|      | Explain what financial benchmarking and ICFP are   |
|      | Summarise why benchmarking and ICFP are an integral part of the financial planning process |
|      | Recognise the context and risks associated with benchmarking and ICFP                      |
|      | Carry out benchmarking activities within your own school's metrics                         |
|      | Clarify the next steps you will take with regards to benchmarking & ICFP                   |

## Suitability

This course is suitable for existing headteachers.

Norfolk local authority maintained schools.

#### **Audience**

Headteachers, finance staff and governors.

### Important information

This is an eLearning course accessed through myOracle. Click on the link to access the course [myOracle] Education Finance - Financial Benchmarking & ICFP (opens in new window)

## **Income Generation**

Raising additional income is essential to enhancing and widening the educational opportunities available to pupils.

#### **Course Outline**

This course outlines the techniques required to establish an income generation strategy and identifies and evaluates additional sources of income for educational establishments.

#### **Course Content**

| - |  |
|---|--|
|   |  |
|   |  |
|   |  |
|   | Identify how income can be increased to enhance learning opportunities   |
|   | - IUEHIIIV HOW IHCOHIE CAH DE IHCIEASEU IO EHHAHCE IEAHIIHU ODDOHUHIIIES |
|   |  |

| O !l       |                   | f     -   -   -  |          |
|------------|-------------------|------------------|----------|
| Compile an | income-deneration | or tung-raising  | stratedy |
| Compile an | income-generation | or raria raiding | onatogy  |

| Define and | evaluate | potential | income | sources |
|------------|----------|-----------|--------|---------|
|            |          |           |        |         |

By the end of the course participants will be able to:

| Recognise | techniques | to compose | a successful | funding | bic |
|-----------|------------|------------|--------------|---------|-----|
|           |            |            |              |         |     |

## **Suitability**

This course is suitable for existing headteachers.

Norfolk local authority maintained schools.

#### **Audience**

Headteachers, finance staff and governors.

## Important information

This is a classroom based, tutor led course booked through SLA Online.

# **Capital Funding**

An introduction to capital funding and spending in Norfolk LA maintained schools.

#### **Course Outline**

This course focusses on the capital funding allocation. It includes information on the rules around what it can be spent on, the application process to spend capital money and how it can be monitored.

#### **Course Content**

| By th | ne end of the course participants will be able to:                   |
|-------|--|
|       | Identify and monitor capital funds                                   |
|       | Understand the assessment of capital spending priorities             |
|       | Identify the different types of capital funding available            |
|       | Understand the process by which schools apply to spend capital funds |

## **Suitability**

This course is suitable for new and existing headteachers.

Norfolk local authority maintained schools only (including VA & VC schools).

#### **Audience**

Headteachers, finance staff and governors.

## Important information

This is an eLearning course accessed through myOracle. Click on the link to access the course [myOracle] Education Finance - Capital Funding (opens in a new window)

# **Electronic Payments (BACS)**

Schools can use Star Accounts to process electronic (BACS) payments.

#### **Course Outline**

This course looks at how to use Star Accounts to process BACS payments to suppliers, as a cost effective alternative to using cheques.

#### **Course Content**

| Ву | By the end of the course participants will be able to: |  |  |  |  |
|----|--|--|--|--|--|
|    | Switch on the BACS function in Star Accounts           |  |  |  |  |
|    | Process BACS payments to suppliers                     |  |  |  |  |
|    | Reconcile BACS transactions at the end of the month    |  |  |  |  |

## **Suitability**

Although aimed at finance staff and business managers (the course focusses heavily on the administrative side of BACS payments), Headteachers might find this course useful in understanding electronic payments (BACS) within their school(s).

Norfolk local authority maintained schools only.

#### **Audience**

Finance Staff and headteachers

### Important information

This is an eLearning course accessed through myOracle. Click on the link to access the course [myOracle] Education Finance - Electronic Payments (BACS) (opens in a new window)

# **Administering Department Codes**

Department Codes are useful for grouping together income & expenditure transactions in order to aid more detailed analysis and closer monitoring.

#### **Course Outline**

This course looks at how the benefits of using department codes, how to create department codes, how to use department codes for activities or trips and how to group department codes.

#### **Course Content**

| By th | ne end of the course participants will be able to:  |
|-------|---|
|       | Understand the importance of using department codes |
|       | Set up new department codes                         |
|       | Use department codes for activities or trips        |
|       | Delete department codes                             |
|       | Make department codes inactive                      |
|       | How to add department codes to a group              |

## **Suitability**

Although aimed at finance staff and business managers (the course focusses heavily on the administrative side of department codes), Headteachers might find this course useful in understanding department codes within their school(s).

Norfolk local authority maintained schools only.

#### **Audience**

Finance staff and headteachers.

## Important information

This is an eLearning course accessed through myOracle. Click on the link to access the course [myOracle] Education Finance - Administering Department Codes (opens in a new window)

## **VAT in Schools**

VAT is part of our everyday lives.

By the end of the course participants will be able to:

In this course you will learn about the main rules and regulations governing how VAT is managed, reported and calculated.

#### **Course Outline**

This course looks at your responsibilities and duties around VAT and how to record it in Star Accounts.

#### **Course Content**

| ٠, ١. | to one of the course participante will be uple to:                 |
|-------|--|
|       | Understand what VAT is and how it is applied to goods and services |
|       | Understand the importance of correctly recording VAT               |
|       | Understand the VAT categories and rates                            |
|       | Deal with VAT on invoices  |
|       | Deal with VAT on goods and services from outside the UK            |
|       | Record VAT in Star Accounts  |

## Suitability

П

Calculate VAT

Although aimed at finance staff and business managers (the course focusses heavily on the administrative side of VAT), Headteachers might find this course useful in understanding VAT within their school(s).

Norfolk local authority maintained schools only.

#### **Audience**

Finance staff and headteachers.

## **Important information**

This is an eLearning course accessed through myOracle. Click on the link to access the course [myOracle] Education Finance - VAT in Schools (opens in a new window)

## Headteacher Refresher

A session aimed at Headteachers that would like to update and enhance their existing school finance knowledge, review latest news and share best practice.

#### **Course Outline**

This course has been designed as a refresher for elements of finance and a review of financial issues and changes currently facing Headteachers. Highly interactive with the emphasis on asking questions and knowledge sharing.

#### **Course Content**

The objectives of the session include:

| <br>The objectives of the occordination                |  |  |  |
|--|--|--|--|
| Review, revisit & refresh specific financial processes |  |  |  |
| Updates on the latest news from around schools finance |  |  |  |
| Discuss and answer questions from participants         |  |  |  |
| Best practice sharing                                  |  |  |  |

## Suitability

This course is suitable for existing headteachers.

Norfolk local authority maintained schools only.

#### **Audience**

Headteachers.

## Important information

This course consists of a live online webinar session booked through SLA Online.

## **Finance in Education**

A suite of nationally recognised professional qualifications to support finance staff and business managers in educational establishments.

#### **Outline**

It is more important than ever for finance professionals working within educational establishments to further develop their business, finance, and accountancy skills. With the increasing pressure to provide value for money in a fast-paced environment, finance professionals need to support the headteacher and leadership teams and the drive to achieve educational goals.

We offer an industry-first suite of professional qualifications that aim to provide Finance staff and Business Managers with the finance and accountancy knowledge needed to administer finances within schools, academies, multi-academy trusts and free schools.

#### **Qualification Levels**

Bookkeeping in Educational Establishments – Level 2

Administering Finance in Education – Level 3

Each qualification is published on the Regulated Qualification Framework and provides practical, real-world accounting and finance knowledge that can be put to use from day one. With a Finance in Education qualification on their CV, your finance staff will be able to demonstrate a level of excellence sought by educational establishments across the UK.

To find out further details about our Finance in Education Qualifications, please contact us on 01603 306407 or <a href="mailto:financequalifications@norfolk.gov.uk">financequalifications@norfolk.gov.uk</a>

## **Bookkeeping in Educational Establishments**

A comprehensive course leading to a Level 2 Award in Bookkeeping in Educational Establishments.

#### **Course Outline**

During the course you will look at how to manage the books including the foundations of double-entry bookkeeping, associated documents, processes, and procedures, focussing on how these impact on educational establishments.

## **Suitability**

This course is ideal for all finance staff and business managers and is especially beneficial to those working in schools that are considering converting to, or have recently changed to, academy status.

#### **Outcome**

Once you have completed your studies you will be ready to take your assessment.

This is an online, open book assessment that typically takes approximately two hours to complete. Successful completion of the assessment will give the learner the accredited Level 2 Award in Bookkeeping in Educational Establishments.

#### **Phase**

Local authority maintained schools and academies.

#### **Audience**

Finance staff and business managers.

#### **Study Time**

Approximately 50 hours self-study.

#### **Format**

This is an online self-study course with an onine 'open book' assessment.

#### Cost

£200 per delegate including assessment.

## **Administering Finance in Education**

In this Level 3 national qualification you'll master day-to-day accountancy processes whilst making a significant contribution towards the achievement of your establishment's educational goals.

## Complete Learning Package

Using the experience of our professional training team, we have developed a comprehensive learning package to help you quickly gain the knowledge and skills required to pass the Administering Finance in Education qualification.

#### **Course Content**

|      | e are 7 mandatory units within this qualification, all of which are focussed on ational establishments: |
|------|---|
|      | Bookkeeping   |
|      | VAT   |
|      | Costing   |
|      | Preparing Financial Accounts  |
|      | Budgeting   |
|      | Procurement   |
|      | Internal Control Systems  |
| Phas | se  |

Local authority maintained schools and academies.

#### Audience

Finance staff and business managers.

### **Study Time**

Approximately 180 hours self-study.

#### **Format**

This is an online self-study course with online 'open book' assessments at the end of each of the seven modules.

#### Cost

£1,250 per delegate including assessment.

# RAG Link

The Finance RAG (Red/Amber/Green) Matrix is an early warning system which helps the local authority to assess financial risk in schools to ensure appropriate support is made available to headteachers and governors as required. It is prepared termly by the finance team and contains a series of financial management criteria to be met, including training.

## **New Headteachers**

It is important that new headteachers are able to gain the skills and knowledge needed to manage the school finances quickly. A new, un-trained headteacher can pose a significant risk to the management of the school budget and decision-making.

The training section of the RAG therefore includes a progressive training process to ensure that new headteachers gain the required skills and knowledge in a timely manner. The current requirements are:

No courses completed – Red rating

Induction session with Education Finance team only completed – Amber 1 rating

New to finance course only completed – Amber 2 rating

All New to finance and core skills courses completed – Green rating

| New  | to finance course: Introduction to School Finance |
|------|---|
| Core | skills courses are:                               |
|      | Budget Setting                                    |
|      | Effective Budget Monitoring                       |
| П    | Fighting Financial Fraud                          |

# **Existing Headteachers**

For the RAG Matrix, existing headteachers (that have been in post for at least one year) will be expected to keep updated on their finance knowledge and skills by completing a defined number of courses/refreshers during a rolling 12-month period.

The number completed will determine the RAG rating:

No courses completed – Red rating

One course only completed – Amber 1 rating

**Two** courses completed – Amber 2 rating

Three or more courses completed – Green rating

All the courses within this brochure count towards the RAG Matrix but there are additional options available. Headteachers can also attend any of the following:

| Any relevant course listed in the Finance staff and Governor brochures  |
|---|
| Budget Workshop (Standard support schools only)   |
| Attendance at a finance support officer budget visit (Enhanced support schools – max 2 per 12 month period, Standard support schools max 1 per 12 month period) |
| Other ad-hoc finance briefing/event held by the Finance team – eligible events will be notified to schools  |

In addition to the above, any relevant **financial** training course provided by a recognised third party provider may count towards the RAG. You will need to provided evidence of the course attended to **finance.support@norfolk.gov.uk** for consideration.

Some of our webinar sessions are recorded – watching any available recorded session in full will also count towards the RAG (unless you attended the live session – as this one will already have been counted). Details on how you can provide evidence for RAG purposes can be found within each recording. Available recordings will be advertised via the regular Finance Focus newsletter produced by the Education Finance team.

## Course Schedule

This is the full schedule for classroom based and online webinar sessions for the 2024 – 25 academic year (includes courses relevant to finance staff and governors).

Classroom sessions will be held at the **Henderson Business Centre**, **51 lvy Road Norwich NR5 8BF**. Details on how to access the webinar sessions will be sent via email to all delegates ahead of each session.

| Course Title                                      | Date       | Time            | Course Type |
|---|------------|-----------------|-------------|
| Autumn Term 24                                    |            |                 |             |
| Star Accounts - Web<br>Upgrade                    | 11/09/2024 | 10am -11.30am   | Webinar     |
| Star Accounts Foundation Purchasing & Expenditure | 18/09/2024 | 10am -11.30am   | Webinar     |
| Star Accounts Foundation Income & Banking         | 25/09/2024 | 10am -11.30am   | Webinar     |
| Star Accounts Foundation Month End                | 02/10/2024 | 10am -11.30am   | Webinar     |
| Star Accounts Foundation  – Full Course           | 09/10/2024 | 9.30am – 1pm    | Classroom   |
| Effective Budget<br>Monitoring                    | 16/10/2024 | 9.15am -12.15pm | Classroom   |
| Headteacher Refresher                             | 06/11/2024 | 10am – 11am     | Webinar     |
| Finance & Star Refresher                          | 13/11/2024 | 10am – 11am     | Webinar     |
| Fighting Financial Fraud                          | 20/11/2024 | 9.15am -12.15pm | Classroom   |
| Governor Finance<br>Refresher                     | 21/11/2024 | 10am – 11am     | Webinar     |
| Income Generation                                 | 27/11/2024 | 9.15am -12.15pm | Classroom   |
| Effective Budget<br>Monitoring                    | 11/12/2024 | 10am -11.30am   | Webinar     |
| 0 : 7 05  |            |                 |             |
| Spring Term 25                                    |            | I               |             |
| Star Foundation – Purchasing & Expenditure        | 09/01/2025 | 10am -11.30am   | Webinar     |

| Star Foundation –<br>Income & Banking                 | 15/01/2025 | 10am -11.30am   | Webinar   |
|---|------------|-----------------|-----------|
| Star Foundation –<br>Month End                        | 22/01/2025 | 10am -11.30am   | Webinar   |
| Budget Setting  | 29/01/2025 | 9.15am -12.15pm | Classroom |
| Budgeting for Governors                               | 05/02/2025 | 9.15am -12.15pm | Classroom |
| Effective Budget<br>Monitoring                        | 06/02/2025 | 10am -11.30am   | Webinar   |
| Headteacher Refresher                                 | 12/02/2025 | 10am -11am      | Webinar   |
| Year End in Star Accounts                             | 24/02/2025 | 10am -11.30am   | Webinar   |
| Year End in Star Accounts                             | 25/02/2025 | 10am -11.30am   | Webinar   |
| Year End in Star Accounts (new starters/first timers) | 26/02/2025 | 9.30am -12.15pm | Classroom |
| Year End in Star Accounts                             | 29/02/2024 | 10am -11.30am   | Webinar   |
| Finance & Star Refresher                              | 12/03/2025 | 10am – 11am     | Webinar   |
| Fighting Financial Fraud                              | 26/03/2025 | 10am -11.30am   | Webinar   |
|   |            |                 |           |

Access to all of our courses is provided to all schools who have purchased any of the Finance Support packages for the respective financial year.

For access to courses in the summer term 2025, the school will have need to have purchased a Finance Support package for the **financial year 2025 – 2026**. The process of purchasing the support package typically takes place around February/March time.

Therefore, schools will be unable to book on any courses in the summer term 2025 until the purchasing process has been completed.

| Summer Term 25                             |            |               |         |
|--|------------|---------------|---------|
| Star Foundation – Purchasing & Expenditure | 30/04/2025 | 10am -11.30am | Webinar |
| Star Foundation – Income & Banking         | 07/05/2025 | 10am -11.30am | Webinar |

| Star Foundation –<br>Month End | 14/05/2025 | 10am -11.30am   | Webinar   |
|--------------------------------|------------|-----------------|-----------|
| Effective Budget<br>Monitoring | 21/05/2025 | 9.15am -12.15pm | Classroom |
| Governor Finance<br>Refresher  | 22/05/2025 | 10am -11am      | Webinar   |
| Headteacher Refresher          | 04/06/2025 | 10am -11am      | Webinar   |
| Finance & Star Refresher       | 11/06/2025 | 10am -11am      | Webinar   |
| Income Generation              | 25/06/2025 | 9.15am -12.15pm | Classroom |
| Effective Budget<br>Monitoring | 02/07/2025 | 10am -11.30am   | Webinar   |
| Fighting Financial Fraud       | 09/07/2025 | 10am -11.30am   | Webinar   |

Details correct at time of publication (August 2024)

# Cancellation Policy

All cancellations must be made through SLA Online or via email to contractsteam@norfolk.gov.uk or finance.training@norfolk.gov.uk

Cancellations received within 3 working days of the course or failure to cancel/failure to attend, will be subject to an administration charge of £50.

For example, if the course is due to take place at 9am on Wednesday, cancellation will need to have been received at the latest by 9am on the preceding Friday to avoid the administration charge being levied.

The charge will be added to the next available download and will be described as 'Non-attendance fee – [course name]'

We will do our very best to ensure that every course date set is delivered but please be aware that a course may not run below the minimum number of 5 delegates, or due to unforeseen circumstances.

In the event of a course being cancelled you will be contacted at the earliest opportunity and offered an alternative date where possible.

The Cancellation policy applies to both classroom and webinar sessions.