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## Financial Services Training Programme - Schools Spring Term 2025

# FINANCIAL SERVICES TRAINING: DEVELOPING YOUR SKILLS

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Financial Services Training Programme Schools Spring Term 2025 Date	Time	Title and link <small>(all underlined text is hyperlinked to information on the Hub booking page)</small>	Format/venue	Cost per delegate
<u>14/01/2025 and 12/02/2025</u>	9:30–11:30	<u><b>Financial Services: New To School Finance (two sessions)</b></u> <ul style="list-style-type: none"><li>• bank account(s)/schedule of financial delegation</li><li>• funding</li></ul>	Online	£118

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		<ul style="list-style-type: none"> <li>• purchases</li> <li>• salary costs</li> <li>• financial transactions</li> <li>• key principles of budgeting</li> <li>• changes in schools/settings that will impact the finances</li> <li>• purpose of budget monitoring and medium-term financial planning</li> <li>• financial calendar for a Hertfordshire maintained school</li> </ul>		
15/01/2025	9:30-12:30	<p><u><a href="#">Arbor Finance Intermediate Users (previously RM Finance Online) Purchase Orders 2024/25</a></u></p> <ul style="list-style-type: none"> <li>• raising purchase orders using the Arbor Finance</li> <li>• receipt goods</li> <li>• making payments</li> </ul>	Online	£80
16/01/2025 29/01/2025 13/02/2025	9:30-12:30	<p><u><a href="#">Financial Services Arbor Finance New Users – (three sessions, run twice)</a></u></p> <ul style="list-style-type: none"> <li>• introduction to the Arbor Finance software, coding structure and how to post simple income and expenditure transactions</li> <li>• posting more complex transactions, including payroll, setting up and using duplicate batching facility and correcting errors</li> <li>• recap on the previous sessions, bank reconciliations and an overview of available reports</li> </ul>	Online	£299
20/01/2025	9:30–11:30	<p><b><u><a href="#">Financial Services: Silver Contract Workshop</a></u></b></p> <ul style="list-style-type: none"> <li>• process of the termly return</li> <li>• support revised forecast queries</li> </ul>	Online	£0

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		<ul style="list-style-type: none"> <li>• support checking the return prepared by the school/setting</li> <li>• topical updates relevant to the termly return</li> </ul> <p><b><u>FS will contact you separately to book on</u></b></p>		
21/01/2025	9:30–11:30	<p><b><u>Financial Services Access Budget Software New User: General Navigation</u></b></p> <ul style="list-style-type: none"> <li>• introduction to the Access Education Budgeting software</li> <li>• general navigation</li> <li>• background data</li> <li>• budgeting for general income and expenditure</li> </ul>	Online	£59
24/01/2025	9:30–11:30	<p><b><u>Introduction To Salary Monitoring</u></b></p> <ul style="list-style-type: none"> <li>• explanation of salary monitoring</li> <li>• purpose of salary monitoring</li> <li>• impact on the school's budget if variances in staff pay</li> <li>• completing the salary monitor</li> <li>• posting staff expenditure transactions to the finance system</li> </ul>	Online	£59
27/01/2025	9:30–12:30	<p><b><u>How to Produce the Monthly Budget Monitor Report</u></b></p> <ul style="list-style-type: none"> <li>• purpose/reporting requirements of the monthly budget monitor report</li> <li>• uploading financial data from Arbor Finance</li> <li>• adding variances</li> <li>• sense checking the monitor</li> <li>• monitoring income, expenditure and staffing</li> <li>• key financial messages</li> </ul>	Online	£80

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27/01/2025	13:30–15:30	<p><a href="#"><u>Financial Services New To Understanding The Monthly Budget Monitor</u></a></p> <ul style="list-style-type: none"> <li>• purpose and understanding of the monthly budget monitor report</li> <li>• setting up the budget monitor report</li> <li>• messages the budget monitor is telling us</li> <li>• recording income and expenditure</li> <li>• key areas to be aware of</li> <li>• overall financial picture of the school</li> </ul>	Online	£59
28/01/2025	9:30–11:30	<p><a href="#"><u>Financial Services Access Budget Software New User: Staffing 2024/25</u></a></p> <ul style="list-style-type: none"> <li>• budgeting for staffing</li> <li>• adding, editing and deleting staff contracts</li> <li>• looking at maternity and other long-term absences</li> </ul>	Online	£59
30/01/2025	9:30–11:30	<p><a href="#"><u>Financial Services: Operating A Gold Contract - What You Need To Know</u></a></p> <ul style="list-style-type: none"> <li>• options available with a Gold contract</li> <li>• monthly financial processes</li> <li>• entering salaries to the salary monitor and then to Arbor Finance</li> <li>• reconciling the bank account</li> <li>• completing comprehensive system reconciliation</li> <li>• mismatch report</li> <li>• submitting VAT claim</li> </ul>	Online	£59

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05/02/2025	9:30-12:30	<p><a href="#"><u>Arbor Finance Intermediate Users (previously RM Finance Online) Electronic Payments 2024/25</u></a></p> <ul style="list-style-type: none"> <li>making electronic payments using Arbor Finance</li> </ul>	Online	£80
06/02/2025	9:30-11:30	<p><a href="#"><u>Financial Services Accruals Preparing for Year-End 2024/2025</u></a></p> <ul style="list-style-type: none"> <li>examples of creditors, debtors, prepayments and receipts in advance</li> <li>identifying accruals at your setting</li> </ul>	Online	£59
10/02/2025	9:30-11:30 or 13:30-15:30	<p><a href="#"><u>Year-end Preparation for Gold Contracts 2024/25</u></a></p> <ul style="list-style-type: none"> <li>overview of the year-end processes</li> <li>bulletins for 2024/2025 including housekeeping</li> <li>preparation of accruals</li> <li>committed balances</li> <li>monthly/Year-end comprehensive system reconciliation</li> <li>year-end bank reconciliation</li> </ul>	Online	£59
11/02/2025	9:30-11:30	<p><a href="#"><u>Financial Services Access Budget Software New User: Reports</u></a></p> <ul style="list-style-type: none"> <li>review of the reports available within the Access Education budgeting software</li> <li>including those specifically designed for Hertfordshire maintained schools</li> </ul>	Online	£59
12/02/2025	9:30-12:30	<p><a href="#"><u>Financial Services Arbor Finance Intermediate Users: Sales Invoicing</u></a></p> <ul style="list-style-type: none"> <li>raising sales invoices using Arbor Finance</li> </ul>	Online	£80

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		<ul style="list-style-type: none"> <li>• receipt income</li> <li>• making refunds</li> </ul>		
27/02/2025  or  03/03/2025	13:30-16:30   9:30-12:30	<p><a href="#"><u>Arbor Finance (previously RM Finance) Year End Preparation for Bronze contracts 2024/25</u></a></p> <p>Morning includes:</p> <ul style="list-style-type: none"> <li>• overview of the housekeeping tasks</li> <li>• overview of system checks</li> <li>• overview of year-end updates from HCC</li> <li>• preparation of accurate accruals</li> <li>• preparation of committed balances</li> </ul> <p>Afternoon: Financial Services staff will be on hand throughout the afternoon to support delegates with the completion of the above tasks</p> <p><b><u>FS will contact you separately to book on</u></b></p>	Online   Online	£80  (£0 for silver contracts)  £80  (£0 for silver contracts)
10/03/2025  or  12/03/2025	9:30-16:30   9:30-16:30	<p><a href="#"><u>Financial Services Budget Preparation Workshop 2025/2026 Digital</u></a></p> <p><a href="#"><u>Financial Services Budget Preparation Workshop 2025/2026 In Person</u></a></p> <p>Morning:</p> <ul style="list-style-type: none"> <li>• provide schools with an update on any changes to Access budgeting software</li> <li>• walk through 'budget planning' process in software</li> <li>• looking at key areas to be aware of when setting the budget for 2025/2026</li> </ul>	Digital   In-person	£144   £190

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		<ul style="list-style-type: none"> <li>overview of latest budget updates from HCC</li> </ul> <p>Afternoon: Financial Services staff will be on hand throughout the afternoon to support with any queries and to advise on the input of your budget plans to Access Budgeting software.</p>		
11/03/2025	9:30-11:30	<p><a href="#"><u>Financial Services Nursery School/Class Budget Workshop 2024/25</u></a></p> <ul style="list-style-type: none"> <li>overview of Early Years funding</li> <li>look at finance schedule from the Early Years portal and applying this to the nursery calculator</li> <li>nursery funding adjustments and understanding calculating adjustments without using the nursery calculator</li> <li>sense checking your Early Years budget</li> </ul>	Online	£59
14/03/2025	9:30-12:30	<p><a href="#"><u>Financial Services Budget Preparation Workshop 2025/2026 for Special Schools and ESCs</u></a></p> <ul style="list-style-type: none"> <li>overview of key areas to be aware of when setting this year's budget and the forecast for 2026/2027 and 2027/2028 at Special Schools and Education Support Centres</li> <li>latest updates from HCC</li> <li>update on any changes to the Access Budgeting software</li> <li>financial Services staff will be on hand, digitally, to support with any queries</li> </ul>	Online	£80
03/04/2025	9:30-16:30	<p><a href="#"><u>Finance (previously RM Finance) Year End Workshop for Silver contracts Digital 2024/25</u></a></p>	Online	£0

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<p><u>or</u></p> <p>10/04/2025</p>	<p>9:30-16:30</p>	<p><u><a href="#">Arbor Finance (previously RM Finance) Year End Workshop for Silver contracts In Person 2024/25</a></u></p> <p>Morning:</p> <ul style="list-style-type: none"> <li>• overview of the year-end processes on Arbor Finance including housekeeping</li> <li>• checklist to be completed ahead of this session</li> <li>• latest updates from HCC</li> </ul> <p>Delegates need to have completed the following before attending the morning session:</p> <ul style="list-style-type: none"> <li>• financial accounts to 31st March 2025, including the bank reconciliation and comprehensive system reconciliation</li> <li>• list of accruals and committed balances</li> <li>• final capital return (not applicable to VA schools)</li> </ul> <p>Afternoon session is <u>optional</u>.</p> <p>Financial Services staff will be on hand throughout the afternoon to support delegates through the process of completing the year-end and to answer any queries relating to the year-end process</p>	<p>In-person</p>	<p>£0</p> <p>(included in contract)</p>