

Schools Finance



Academies Service Level Agreement 2024/25



Introduction from Service Lead

Dear Headteacher, Chair of Governors and School Business Manager

Welcome to the Service Schedule for the Schools Finance Team, which contains all of the information you will need about our service.

We look forward to working with you.

Jo Morris - Schools Finance Team Leader

Description of our service

Schools Finance support services are available for academies based on a bespoke service offering a range of pick and mix options as outlined below and on Appendix 2.

Individual responsibilities of our staff

| Roles | Responsibilities |
|--|---|
| Jo Morris Schools Finance Team Leader | <ul style="list-style-type: none">• Responsible for the management of the Schools Finance Team. |
| Schools Finance Officers | <ul style="list-style-type: none">• Responsible for delivery of service. |

What we can do for you:

| Ref. | |
|------|---|
| | Financial Advice & Guidance |
| P1 | Access to named Finance Officer. |
| P2 | Telephone/email helpline. |
| P3 | Support academic year salary forecast for budgeting/planning. |
| P4 | Support monitoring and report of variation to actual salaries against budget. |
| P5 | Remote access support. |
| P6 | Attend annual budgeting meeting. |
| P7 | Finance health check, advice and support. |
| P8 | Support income budgeting and forecasting – GAG and other Grants. |
| P9 | Budget variance support. |
| P10 | Attend half day termly budget monitoring meeting. |
| P11 | Ad-hoc updates and advice on budgeting issues and funding changes. |

What we require from you:

| Ref. | |
|------|---|
| C1 | Customer to provide appropriate reports and documentation as requested within 5 working days. |
| C2 | Customer to provide read only access to data, either remote or licensed, cost of access to system to be paid by the customer. |
| C3 | Provider requests a minimum of 5 working days' notice for preparation of reports. |
| C4 | Customer to provide initial training on accounts and budgeting system software as required. |

Days/times during which Services are to be available

| | |
|--------------------|------------|
| *Monday – Thursday | 9am – 5pm |
| *Friday | 9am – 4 pm |

*Subject to Finance Officer’s working days. Service delivery is limited during school holidays.

Contact information

| For more information | |
|----------------------|-----------------------------|
| Contact name | Jo Morris |
| Role | Schools Finance Team Leader |
| Telephone | 01743 256244 |
| Email | Jo.morris@shropshire.gov.uk |

Charging and enquiries

For details on the various packages available for this service, including pay-as-you use options, or if you have any queries or issues regarding your service arrangements, please contact us on the above contact details.

Additional Services

Additional services (pay as you go) will be billed at point of delivery.