EES for schools



Course and Conference Programme

The courses and events published in this brochure are those relating to Finance as of Friday 29 March 2024.

The brochure is updated on a daily basis.

We hope you find this useful.

List of events covered in this brochure:

Please click on the event below to jump directly to the event details. To return to this page afterwards, click on the event title on the details page.

- Benchmarking for Schools & Academies - Finance Staff
- Budget Planning for Academy Finance
- Cashflow Planning & Monitoring Schools & Academies - Finance Staff
- Finance Modular Training for Headteachers & Deputies ACADEMIES - Module 5 Forward Financial Planning
- Finance Modular Training for Headteachers & Deputies ACADEMIES - Module 6 Benchmarking and Internal Controls
- Finance Modular Training for Headteachers & Deputies for SCHOOLS - Module 6 Benchmarking and Internal Controls
- Finance Modular Training for Headteachers & Deputies SCHOOLS - Module 5 Forward Financial Planning
- Forward Financial Planning for Academies
- Forward Financial Planning for Essex Schools

Benchmarking for Schools & Academies - Finance Staff

Event Summary	This course is designed for school and academy finance staff and aims to give an overview of the benefits of benchmarking using a detailed demonstration of the government benchmarking website, and explains how to interpret the results for reporting to your governing body.
Event description	The course covers the reasons behind benchmarking, why it is important and how to interpret the data. During this session we will give a full and detailed demonstration of the government's benchmarking website showing the different ways it can be used to view your historic data and comparisons with other schools and academies. We will explain how to use the information produced to report to your governing body so they can discuss an action plan should any remedial action be ncessary. Benchmarking is a key element within the SFVS and the SRMSAC. There will be plenty of opportunity for delegates to ask questions throughout the session. The finish time is approximate depending on the number of questions.
Learning Outcomes	Delegates will gain an understanding of the importance of benchmarking, how it is done, how to interpret the results and report on them to the governing body.
Subject Areas	Finance
Key Stages	KS1 / KS2 / KS3 / KS4 / KS5
Type of school	Infant / Junior / Primary / Secondary / Special
Target audience	Office staff
Trainers	Nicole Ramsay

Start Date	Location	Times	Event Code
13 Jun 2024	Juniper	09:30 to 12:15	PEF 23/055

Budget Planning for Academy Finance

Event Summary	This course is designed for academy finance staff and aims to give an overview of the processes involved in budget planning and monitoring, and to raise awareness of reporting responsibilities both internally and externally.
Event description	The course covers different funding sources and explains how to understand the GAG Statement. We will be focusing on the methods and processes of budgeting, and effective ways of monitoring the budget during the year, including reporting to governors and Trustees. There will be a demonstrationusing Juniper spreadsheets to help embed your understanding of staffing calculations and budget planning. Despite being delivered remotely using Microsoft Teams, there will be plenty of opportunity for questions or sharing information throughout the course.
Learning Outcomes	To provide an understanding of how the academy is funded, why we budget. You will leave this course with the confidence in preparing the budget, and reporting to trustees, including monthly budget monitoring reports.
Subject Areas	Finance
Key Stages	EYFS / KS1 / KS2 / KS3 / KS4 / KS5
Type of school	Infant / Junior / Primary / Secondary / Special
Target audience	Office staff
Trainers	Nicole Ramsay

Start Date	Location	Times	Event Code
9 May 2024	Juniper	09:30 to 15:30	PEF 24/001

Cashflow Planning & Monitoring Schools & Academies - Finance Staff

Event Summary	This course is designed for school/academy finance staff and aims to give an understanding of Cashflow planning, monitoring and reporting to governors/trustees.
Event description	The course covers the fundamentals of Cashflow, why it is important to plan by linking to budget profiling, and explains how to monitor Cashflow on a monthly basis, including reporting to Governors and Trustees. There will be a demonstration of our Cashflow tool to help embed your understanding. Despite being delivered remotely on Microsoft Teams, there will be plenty of opportunity for questions or to share information throughout the session.
Learning Outcomes	An understanding of the importance of Cashflow monitorig, plus confidence in Cashflow forecasting, management and reporting to governors/trustees.
Subject Areas	Finance
Key Stages	KS1 / KS2 / KS3 / KS4 / KS5
Type of school	Infant / Junior / Primary / Secondary / Special
Target audience	Office staff
Trainers	Nicole Ramsay

Start Date	Location	Times	Event Code
16 May 2024	Juniper	09:30 to 12:15	PEF 24/002

Finance Modular Training for Headteachers & Deputies ACADEMIES - Module 5 Forward Financial Planning

Event Summary	This module assists delegates with their understanding of preparing multi-year budgets to ensure that current levels of expenditure are sustainable and that longer term resource decisions can be made with confidence.
Event description	Designed with Headteachers and Deputy / Assistant headteachers in mind, this module assists delegates with their understanding of preparing multi-year budgets to ensure that current levels of expenditure are sustainable and that longer term resource decisions can be made with confidence. This course introduces delegates to the theory behind forward planning as well as providing the practical skills to produce and maintain a 3 - 5 year financial plan.
Learning Outcomes	You will leave this course with the practical skills and confidence to produce and maintain a three year financial plan.
Subject Areas	Finance / Leadership & Management
Key Stages	KS1 / KS2 / KS3 / KS4 / KS5
Type of school	Infant / Junior / Primary / Secondary / Special
Target audience	Leadership
Trainers	Nicole Ramsay

Start Date	Location	Times	Event Code
30 Apr 2024	Juniper	09:30 to 12:00	PEF 23/027

Finance Modular Training for Headteachers & Deputies ACADEMIES - Module 6 Benchmarking and Internal Controls

Event Summary	This module assists delegates with their understanding of financial benchmarking and internal financial controls.
Event description	Designed with Headteachers and Deputy/Assistant Headteachers in mind, this final module introduces the concept of financial benchmarking and internal financial controls. There will be a practical demonstration of the Schools Financial Benchmarking website plus an explanation of how to interpret the results. We will also provide delegates with information relating to internal financial controls and procedures which are vital for fraud prevention and protecting public money.
Learning Outcomes	You will leave the course with the confidence to complete benchmarking activities, as well as understanding your responsibilities in relation to Internal controls and how to monitor them.
Subject Areas	Finance / Leadership & Management
Key Stages	KS1 / KS2 / KS3 / KS4 / KS5
Type of school	Infant / Junior / Primary / Secondary / Special
Target audience	Leadership
Trainers	Nicole Ramsay

Start Date	Location	Times	Event Code
25 Jun 2024	Juniper	09:30 to 12:00	PEF 23/029

Finance Modular Training for Headteachers & Deputies for SCHOOLS - Module 6 Benchmarking and Internal Controls

Event Summary	This module assists delegates with their understanding of financial benchmarking and internal financial controls.
Event description	Designed with Headteachers and Deputy/Assistant Headteachers in mind, this final module introduces the concept of financial benchmarking and internal financial controls. There will be a practical demonstration of the Schools Financial Benchmarking website plus an explanation of how to interpret the results. We will also provide delegates with information relating to internal financial controls and procedures which are vital for fraud prevention and protecting public money.
Learning Outcomes	You will leave the course with the confidence to complete benchmarking activities, as well as understanding your responsibilities in relation to Internal controls and how to monitor them.
Subject Areas	Finance / Leadership & Management
Key Stages	KS1 / KS2 / KS3 / KS4 / KS5
Type of school	Infant / Junior / Primary / Secondary / Special
Target audience	Leadership
Trainers	Nicole Ramsay

Start Date	Location	Times	Event Code
26 Jun 2024	Juniper	09:30 to 12:00	PEF 23/030

Finance Modular Training for Headteachers & Deputies SCHOOLS - Module 5 Forward Financial Planning

Event Summary	This module assists delegates with their understanding of preparing multi-year budgets to ensure that current levels of expenditure are sustainable and that longer term resource decisions can be made with confidence.
Event description	Designed with Headteachers and Deputy/Assistant Headteachers in mind, this module assists delegates with their understanding of preparing multi-year budgets to ensure that current levels of expenditure are sustainable and that longer term resource decisions can be made with confidence. This course is computer based and introduces delegates to the theory behind forward planning as well as providing the practical skills to produce and maintain a three year financial plan.
Learning Outcomes	You will leave this course with the practical skills and confidence to produce and maintain a three year financial plan.
Subject Areas	Finance / Leadership & Management
Key Stages	KS1 / KS2 / KS3 / KS4 / KS5
Type of school	Infant / Junior / Primary / Secondary / Special
Target audience	Leadership
Trainers	Jo Tuckwell

Start Date	Location	Times	Event Code
2 May 2024	Juniper	09:30 to 12:00	PEF 23/028

Forward Financial Planning for Academies

Event Summary	This course is designed for Academy Finance Staff who prepare or assist with preparing multi-year budgets.
Event description	The course introduces delegates to the theory behind forward planning, why it is so important, as well as providing the practical skills to produce and maintain a forward financial plan. We will also give advice on how the forward financial plan should link to the School Development Plan and discuss reporting requirements. There will be a practical demonstration using the Juniper planning tools. There is plenty of opportunity for delegates to ask questions throughout the session. Finish time is approximate depending on the number of questions.
Learning Outcomes	You will leave this course with the confidence to produce your own academy's forward financial plan and ability to discuss the outcomes with your trustees.
Subject Areas	Finance
Key Stages	KS1 / KS2 / KS3 / KS4 / KS5
Type of school	Infant / Junior / Primary / Secondary / Special
Target audience	Office staff
Trainers	Nicole Ramsay

Start Date	Location	Times	Event Code
23 May 2024	Juniper	09:30 to 12:15	PEF 23/053

Forward Financial Planning for Essex Schools

Event Summary	This course is designed for School Finance Staff who prepare or assist with preparing multi-year budgets. It is primarily intended for Essex LA schools as the demonstration uses Essex LA tools.
Event description	The course introduces delegates to the theory behind forward planning, why it is so important, as well as providing the practical skills to produce and maintain a forward financial plan. We will also give advice on how the forward financial plan should link to the School Development Plan and discuss reporting requirements. The practical demonstration will be using the Essex LA planning tools as example. there is plenty of opportunity for delegates to ask questions throughout the session. Finish time ia approximated depending ont he number of questions.
Learning Outcomes	You will leave this course with the confidence to produce your own school's forward financial plan and ability to discuss the outcomes with your headteacher and governing body.
Subject Areas	Finance
Key Stages	KS1 / KS2 / KS3 / KS4 / KS5
Type of school	Infant / Junior / Primary / Secondary / Special
Target audience	Office staff
Trainers	Nicole Ramsay

Start Date	Location	Times	Event Code
22 May 2024	Juniper	09:30 to 12:15	PEF 23/054

This information is issued by Juniper Education.

Juniper Education supports schools with the key professional services that impact on learning. These include:

- School Effectiveness+
- Clerking Agency
- Education Consultancy
- Education Finance Support
- Education HR
- Governor Services
- Training and Development
- School Library Service
- Target Tracker

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