

## Appendix I – Financial support to schools

### 1. Financial service - overview

To help schools and governing bodies meet the requirements of Local Management of Schools and Fair Funding, specifically, providing advice and assistance with budget planning and financial management and administration.

### 2. Response rate

The total number of schools responding to this question is shown below in Table 1 from 2004/05 to 2009/10. It also shows how this figure equates to the total survey population. The details are listed below in Table 1.

| Year    | Number of responses | % of Leeds Schools |
|---------|---------------------|--------------------|
| 2004/05 | 155                 | 56.98%             |
| 2005/06 | 91                  | 33.45%             |
| 2006/07 | 106                 | 38.97%             |
| 2007/08 | 92                  | 34.07%             |
| 2008/09 | 120                 | 44.44%             |
| 2009/10 | 117                 | 43.33%             |

Table 1 : Total number of responses by year.

### 3. Service providers

The table lists the total responses for 2005/06, 2006/07, 2007/08, 2008/09 and 2009/10 and further breaks down the responses into primary, secondary and other phases for 2009/10.

| Service Provider                    | 2005/06 | 2006/07 | 2007/08 | 2008/09 | 2009/10 |           |       |       |
|-------------------------------------|---------|---------|---------|---------|---------|-----------|-------|-------|
|                                     | Total   | Total   | Total   | Total   | Primary | Secondary | Other | Total |
| Financial Services, Education Leeds | 106     | 106     | 92      | 120     | 104     | 12        | 1     | 117   |

Table 2 : Total number of responses by service provider.

All schools responding to this question procured their financial support from financial services provided by Education Leeds, therefore they are the single provider within this service sector.

### 4. Performance level

The key performance level review is measurable on a scale of 1 = very good, 2 = good, 3 = highly satisfactory, 4 = satisfactory, 5 = unsatisfactory, 6 = poor and 7 = very poor. The mean performance level is shown in Table 3 below. The full list of unedited comments is listed in [Annex I](#)

| Service Provider                    | 2007/08 |                   | 2008/09 |                   | 2009/10 |                   |        |
|-------------------------------------|---------|-------------------|---------|-------------------|---------|-------------------|--------|
|                                     | Avg.    | Performance Level | Avg.    | Performance Level | Avg     | Performance Level | Change |
| Financial Services, Education Leeds | 1.46    | Very good         | 1.41    | Very good         | 1.38    | Very Good         | Better |

Table 3 : Performance level

The financial support provided by Education Leeds recorded an average performance score of 1.38, this is rated a very good service and is the highest attainable score. The level of service has recorded a slight increase on last years score. Schools provided a wealth of positive feedback

### 5. Service providers – value for money

Schools were asked to record whether or not the service provider was delivering value for money. The responses are listed below in Table 4. The table sub-divides the responses into primary and secondary phases.

| Service Provider                    | Primary |    |            | Secondary |    |            | Total |    |            |
|-------------------------------------|---------|----|------------|-----------|----|------------|-------|----|------------|
|                                     | Yes     | No | No comment | Yes       | No | No comment | Yes   | No | No comment |
| Financial Services, Education Leeds | 95      | 0  | 9          | 9         | 1  | 2          | 105   | 1  | 11         |

Table 4 : Value for money by service providers

Almost all of the schools from both the primary and secondary phases rated this service provider as delivering value for money.

#### 6. Service providers – improvement

Schools were asked to record how the service provider could improve their service delivery and what steps they were taking to ensure that this was taking place. Table 5 lists the response to this question.

| Service Provider                    | Primary |    |            | Secondary |    |            | Total |    |            |
|-------------------------------------|---------|----|------------|-----------|----|------------|-------|----|------------|
|                                     | Yes     | No | No comment | Yes       | No | No comment | Yes   | No | No comment |
| Financial Services, Education Leeds | 38      | 27 | 39         | 5         | 5  | 2          | 43    | 32 | 42         |

Table 5 : Expected improvement by service providers

The results highlight that there is a mixed view as to whether the service can be improved. However, the general sense from free text comments is that it would be difficult to improve the service that is already in place.

A full list of comments is available in [Annex 1](#)

## Annex I – Financial Services, Education Leeds

### 1. Please explain why you rate the service provider this way?

#### Positive responses

- Excellent - especially .....
- Finance Officers always offer good advice and support.
- No comments to make - I am satisfied with the service I receive.
- Staff always helpful, friendly and supportive.
- Excellent! What more is there to say?
- Response from staff is very quick and helpful; support for Financial Management Standard was extremely focused and very useful.
- We are given effective support. I would just like finance officers to ensure that their advice is consistent to avoid discrepancies in financial management.
- Excellent.
- Very good relationship with LEA finance officer, provided excellent support to the school on all finance issues.
- Very supportive team of Finance Officers, good training programme.
- Always really useful.
- Always get excellent support from this service. .... our peri bursar was excellent. .... is always very helpful when we need advice. Thank You.
- Excellent support from our Education Leeds finance officer and other contacts in Education Leeds Finance section.
- I have been very pleased with the support I have received from ..... the schools finance officer this term.
- Good relationship with Finance Officer. Excellent knowledge base. Good courses. Someone always at the end of the phone.
- Always on hand for help and advice.
- Always a good service from our finance officer.
- First class service in all aspects of finance. Excellent value for money.
- I appreciate having an experienced, quality Finance Officer now.
- I come into contact with financial services on a regular basis. I always find them to be efficient and helpful on each occasion. They provide a wide range of support documentation which I find extremely helpful. The training courses they provide are comprehensive and useful and their level of service provision is excellent.
- Very good advice on all financial matters. Very good training courses.
- Excellent Service.
- Excellent advice, good practical help, we love .....
- Excellent service / Highly skilled staff.
- We get excellent support and advice.
- ..... is excellent.
- Support from School Finance Officer has been excellent - ..... - very supportive.
- Very please with all support / advice.
- Excellent advice from our Finance Officer - ..... - can't speak too highly of her support.
- Knowledgeable and friendly staff, prompt responses to queries and good training programmes.
- Finance Officer is always well prepared and helpful. There is a helpline available. Training courses provided are of a high standard. More help on admin on FMSiS has been provided.
- Very reliable.
- I have a good working relationship with finance section and value their support especially that of ..... our finance officer.
- Assistance always available when required. High level of support offered to schools. Good training opportunities offered to school based staff.
- Excellent support, always extremely helpful and supportive staff.
- Personalised service. High calibre of professional staff. Quick response time to queries. Prompt action to support budget hot spots. Made the forms easier to understand!!!
- Couldn't do the job without them.

- The management support for finance is very good and improvements in the 3-year model much appreciated. Support for school admin staff has not been quite so good this year.
- Have always found the staff highly competent and reliable. A very good service. Thank You.
- This is an excellent service. Training service excellent, personnel very good. Prompt response to telephone queries.
- Finance Officer very supportive and arranged regular meeting for updates on budget planning and finance issues.
- Always willing to offer advice and help with problems and budgeting issues. Any officer will assist whether assigned to school or not. Good training programme, very efficient web space with relevant links.
- Excellent support. Reliable and courteous staff, with good professional knowledge. Excellent value for money.
- Our finance officer is excellent and we have good support from her.
- We have a very efficient, helpful and knowledgeable Finance Officer who seems very eager to help whenever he is called upon.
- I like the fact that one financial advisor is attached to a school, therefore knows how the school works and its priorities etc.
- Extremely helpful finance officer. Useful FMSiS.
- Excellent support and advice received from a very talented finance officer and in her absence and very good service from other finance team.
- We have worked well and effectively with our Finance Officer for a number of years and have followed his good advice.
- Prompt efficient and friendly supportive service.
- A very customer friendly service with high quality input.
- Efficient and Helpful.
- Excellent - the best we get.
- Excellent personal support from school finance officer. Timely advice and support.
- As always an excellent service. Our Finance Officer has many years of experience. His knowledge and advice is invaluable not only at our school but also at schools we have supported.
- Very helpful and efficient.
- Always very good service.
- Excellent information and telephone support from all officers - when your own finance officer is not available. Excellent advice and support from Finance Officers (Children's centre, school, extended services).
- Excellent, prompt service. Noting too much trouble.
- No problems - excellent finance officer support. .... - we think ..... is extremely conscientious diligent and supportive and patient.
- Support from finance officer good. 3 year model not that relevant when % mobility is so high.
- Excellent service and excellent finance officer.
- Good relationship with finance officer always available for advice.
- Very professional service offered in particular by ....., responds quickly to calls and offers sound and pertinent advice.
- Our finance officer is very thorough and knows her stuff!
- Finance officer always available to give sound advice. Much appreciated. Frustrating issue this year with procurement cards and would like to give feedback on this but don't know where to do it.
- Excellent.
- ..... supports school effectively on a monthly basis.
- Excellent Support.
- Absolutely brilliant.
- Great! Quick responses and knowledgeable.
- Always willing to help.
- From being a new head to now I have received excellent service from my finance officer and also from the wider team. They are very prompt to help with queries and advice and willing to attend governors meetings. Very professional but approachable.
- Helpful, informative provide training requirements in all aspects of finance.
- ..... is a star. He is always supportive and at the end of a phone. We have a great relationship with him which we value greatly.

- Our finance officer and other members of the team are an excellent resource and give a high quality support.
- Excellent! All staff very helpful advice consistent and accurate - excellent support from all officers.
- Our finance officer ..... is great. What more can I say.
- Finance technicians are fab.
- Always very helpful - finance officer ..... is excellent.
- Have always managed to support where necessary and deal quickly and efficiently with queries.
- Service is excellent. We couldn't manage without our finance officer - ..... She repeatedly goes the 'extra mile' to ensure we have all the help and support necessary and is wonderfully patient and sympathetic to our problems. Replies to phone messages / email quickly.
- Excellent service for advice and support. Staff always helpful and polite.
- Good training and general support but our finance officer regularly makes mistakes with our 3 year model - this year missing nearly £50K expenditure year on year.
- Work will with school never feel you are a nuisance. Finance officer thorough and reliable and communications are excellent.
- Extremely supportive.
- Good advice given from Financial Services - could be improved by the school being able to contact their particular finance officer more frequently, rather than waiting for them to be in the office.

### **Negative responses**

- Not enough regular communication with schools. Relies on schools to check infobase for news. Finance Officers come across as auditors more than supportive partners. FMSiS causes high level of pressure and additional workload. Issues have been raised with ..... (22/10/09) Awaiting response (10/11/09) Issues have greatly improved of late (12/12/09).
- Sometimes the support from our personal finance officer is a little lacking.
- No confidence in information being provided and left feeling like we had no support, although service has improved exponentially this year already. There was also a lack of acknowledgement to queries, so don't know if things are being dealt with. Would be grateful for simple acknowledgement emails. Sometimes service depends on who you speak to on the phone.
- Sometimes advice is given via finance officer but more teaching style could be taken by the officer to ensure understanding.