

Financial Services Training Programme - Schools Summer Term 2025



FINANCIAL SERVICES TRAINING: DEVELOPING YOUR SKILLS

Structured financial training comes your way through clear, professional digital or in-person sessions. Every term fresh content is added to our HFL Education Hub providing just what schools need ahead of the curve.

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HFL

Date	Time	Title and link (all underlined text is hyperlinked to information on the Hub booking page)	Format/venue	Cost per delegate (all prices +VAT)
07/05/2025	9:30-12:30	<u>Arbor Finance Intermediate Users: Purchase Orders</u> <ul style="list-style-type: none">raising purchase orders using the Arbor Financereceipt goodsmaking payments	Online	£80

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08/05/2025 21/05/2025 11/06/2025	9:30-12:30	<u>Arbor Finance New Users</u> – (three sessions) <ul style="list-style-type: none"> introduction to the Arbor Finance software, coding structure and how to post simple income and expenditure transactions posting more complex transactions, including payroll, setting up and using duplicate batching facility and correcting errors recap on the previous sessions, bank reconciliations and an overview of available reports 	Online	£299
13/05/2025 <u>and</u> 09/06/2025	9:30–11:30	<u>New To School Finance</u> (two sessions) <ul style="list-style-type: none"> bank account(s)/schedule of financial delegation funding purchases salary costs financial transactions key principles of budgeting changes in schools/settings that will impact the finances purpose of budget monitoring and medium-term financial planning financial calendar for a Hertfordshire maintained school 	Online	£118
20/05/2025	9:30-12:30	<u>Arbor Finance Intermediate Users: Electronic Payments</u> <ul style="list-style-type: none"> making electronic payments using Arbor Finance 	Online	£80
21/05/2025	9:30-12:30	<u>Arbor Finance Load the Budget: Intermediate - Digital</u> <ul style="list-style-type: none"> understand the importance of loading the budget correctly learn how to profile your budgets demonstration how to load a budget successfully 	Online	£80

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03/06/2025	9:30-16:30	<u>Arbor Finance Load the Budget: Beginner – In Person</u> <ul style="list-style-type: none"> • understand the importance of loading the budget correctly • learn how to profile your budgets • demonstration how to load a budget successfully • supported environment to load your own budget with FS colleagues on hand to support and answer any questions 	In-person	£190
10/06/2025	9:30–11:30	<u>Introduction To Salary Monitoring</u> <ul style="list-style-type: none"> • explanation of salary monitoring • purpose of salary monitoring • impact on the school's budget if variances in staff pay • completing the salary monitor • posting staff expenditure transactions to the finance system 	Online	£59
17/06/2025	9:30–12:30	<u>How to Produce the Monthly Budget Monitor Report</u> <ul style="list-style-type: none"> • purpose/reporting requirements of the monthly budget monitor report • uploading financial data from Arbor Finance • adding variances • sense checking the monitor • monitoring income, expenditure and staffing • key financial messages 	Online	£80
18/06/2025	9:30-12:30	<u>Arbor Finance Intermediate Users: Sales Invoicing</u> <ul style="list-style-type: none"> • raising sales invoices using Arbor Finance • receipt income • making refunds 	Online	£80

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24/06/2025	9:30–11:30	<p><u>Operating a Gold Contract - What you need to know</u></p> <ul style="list-style-type: none"> • options available with a Gold contract • monthly financial processes • entering salaries to the salary monitor and then to Arbor Finance • reconciling the bank account • completing comprehensive system reconciliation • mismatch report • submitting VAT claim 	Online	£59
26/06/2025	9:30–11:30	<p><u>New to Understanding the Monthly Budget Monitor</u></p> <ul style="list-style-type: none"> • purpose and understanding of the monthly budget monitor report • setting up the budget monitor report • messages the budget monitor is telling us • recording income and expenditure • key areas to be aware of • overall financial picture of the school 	Online	£59