

## North Tyneside Budget Tool Project Survey

Here are the results of the survey into replacing the current budget tool completed by schools following the budget tool demonstrations provided by Access Education and School Business Services in January 2021.

Schools were asked a number of general questions about the project to replace the current budget tool, plus specific questions about the two tools demonstrated.

Please select your responsibilities within this organisation:

[More Details](#)

● Headteacher	8
● School Finance Lead (e.g. burs...	26
● Council Finance team	2
● Other	1



Do you agree that the existing budgeting tool provided by the School Finance Service within North Tyneside Council needs to be replaced or updated?

● Yes	23
● No	0
● Maybe	14



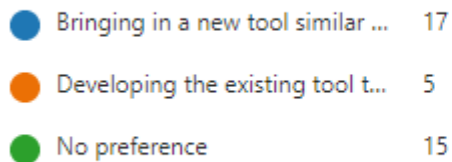
Do you agree the optimum solution would be to replace the existing budgeting tool with one that is supported centrally by the School Finance Service within North Tyneside Council? This would mean any tool would be fully integrated into the North Tyneside IT systems and managed centrally.

● Yes	28
● No	0
● Maybe	9



Would you prefer we look at:

- Bringing in a new tool similar to the tools demonstrated in January
- Developing the existing tool to deliver more functionality
- No preference



Would you be willing to pay an increased SLA fee for the added functionality of the budget tools that have been demonstrated?



Are you willing to take part in a pilot of one of these systems, if we choose to use this as an assessment route?



## Demonstrated Tools Results

Following the demonstrations of the two popular budget tools available, schools were asked to rate the tools over four statements, plus give the score the tools on whether they would recommend we use that tool, giving a net promoter score (NPS) rating. These tools are

available on the G-Cloud provided by Central government so any centrally managed procurement exercise would be much easier than usual.

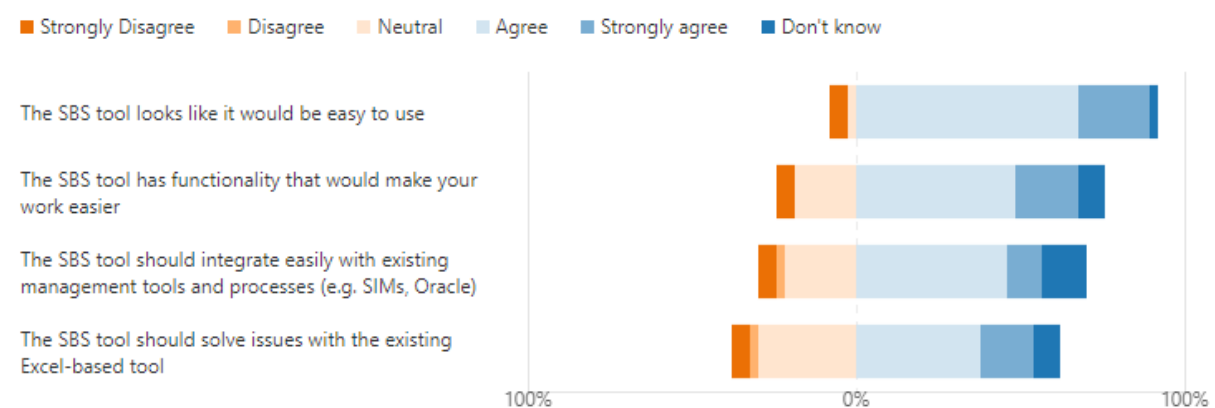
Both tools received generally positive reviews, though both NPS scores were below average. Following the demo sessions both providers were asked to supply what they see as the main benefits moving to their tool would bring to our schools.

### SBS Tool Demonstration Results

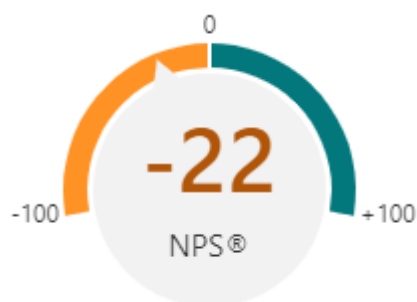
The SBS tool was demonstrated at weekly sessions throughout January. The results given below include replies from schools that have already purchased the SBS system.

Whilst both systems were positively scored, the SBS tool scored better on ease of use, based on the demos.

### SBS Tool Usage Ratings



### SBS Tool NPS Score



The SBS NPS score came in at -22, with an average score of 7.05 out of 10.

### Benefits of Transferring to the SBS Tool

SBS provided the following benefits to using their tool following discussions with other adopters within their customer base:

- Budget export – budget broken down by code/profile. Exported into excel and in the correct format to import straight into FMS
- Export Cumulative Expense Analysis – exported straight from FMS and imported into SBS Budgets for Budget Monitoring

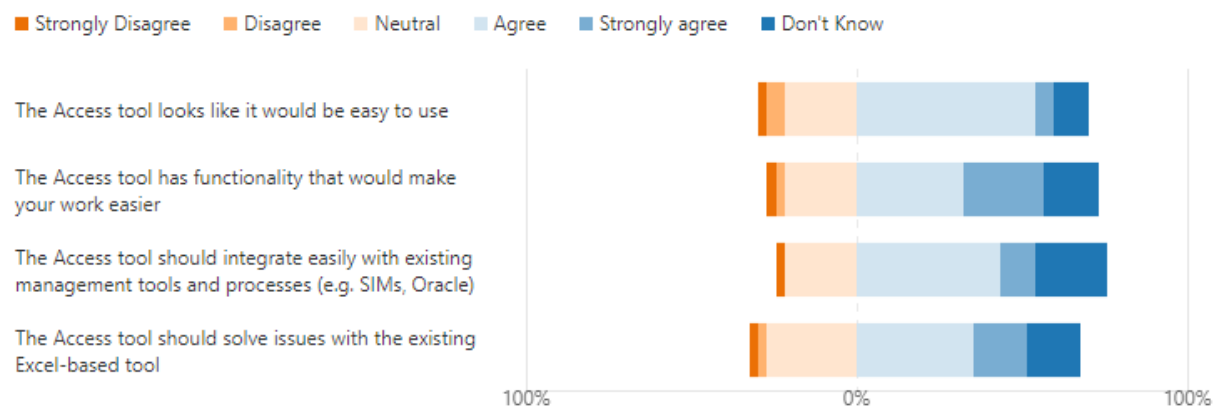
- Payroll reconciliation – import monthly payroll file and gives automatic reconciliation against expected amounts
- Salary Statements – run these straight off for all staff
- Duplicate budgets/scenarios at any time keeping all core data the same
- Bulk actions on a number of areas such as staff increments, budget entry inflation and budget entry profiling
- All initial information is setup by us so schools will have that starting point

## Access Tool Demonstration Results

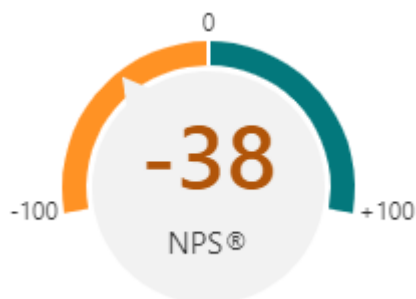
The Access tool was demonstrated at a single session in January. The results given below include nil replies from schools that have already purchased the SBS system.

Whilst both systems were positively scored, the SBS tool scored better on integration, based on the information gleaned from the demo..

### Access Tool Usage Score



### Access Tool NPS Score



The Access NPS score came in at -38, with an average score of 6.24 out of 10.

## Benefits of Transferring to the Access Tool

Access provided a brochure on the benefits of transferring to their products. They sell the benefits of their system as:

The budgeting process can be complex. Using tools designed for the job not only makes the process easier and quicker, but it also reduces the risk of errors and oversights. Access Education Budgets is a powerful budget planning tool used by 1 in 3 schools and half of all academies.

The easy-to-use system allows you to:

- Plan and monitor your budget
- Create forecasts for up to five years
- Model the impact of changes
- Quickly produce comprehensive reports

By integrating a curriculum and staffing resource planning tool like Access Education Curriculum, you can also quickly understand the financial viability of your staffing structure and curriculum in the short, medium and long-term.

## Conclusions

The majority of schools would like to see a new tool in place to replace the existing budget tool and would like that tool to be integrated centrally with the finance service.

Most schools were noncommittal about paying extra for any replacement tool, with more clarity around cost: benefits being required.

Interestingly, most schools would like to be part of the pilot, which shows a willingness to be early adopters.

Both systems reviewed would benefit the schools in North Tyneside. Despite a number of schools already approaching SBS and signing up to their system, the way forward would be to carry out a tendering process using previously selected criteria and seeing which tool was successful.