

Access Education Budgets

A powerful budget planning
and forecasting tool for
schools and trusts



As budgets are stretched thinner, robust planning and management is even more essential

Our online budgeting software allows you to plan and monitor your budget, create forecasts for up to five years, model the impact of changes, and produce quick, powerful reports. Supporting you to make better-informed decisions about your school's future.



Powerful budget planning and forecasting

Online budgeting software designed for the education sector

Access Education Budgets is a powerful budget-planning and monitoring tool designed exclusively for schools and trusts.

You can create an accurate budget and forecasts of up to five years, identify budget deficits and easily model the financial impact of numerous scenarios, such as changes in staff, pay, pupils, income or expenditure. By showing you the impact of change, it helps you make informed decisions and make effective short-, medium- and long-term plans.

It uses school-specific income and expenditure settings, accurate salary calculators using the latest National Insurance rates and threshold values, inflation factors, and automatic in-year updates for all DfE, ESFA and National Insurance requirements.

And because it's cloud-based it can be accessed anytime, anywhere – with no extra IT costs.

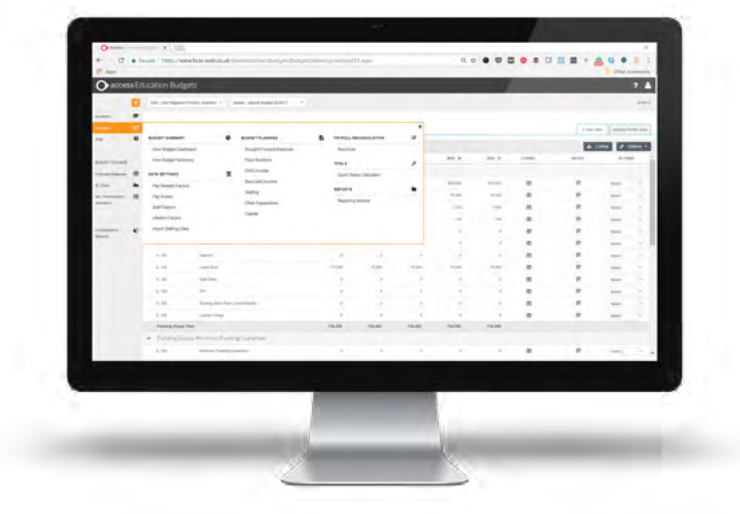


Budget monitoring and reporting

Budget monitoring

Access Education Budgets seamlessly integrates with our education accounting software, Access Education Finance, and other accountancy software including PS Financials, Civica and SIMS FMS.

This means you can easily import your account codes to assign budget lines to your chart of accounts, and transfer data between your budget and accounting software to monitor real-time spending against your original and current budget.

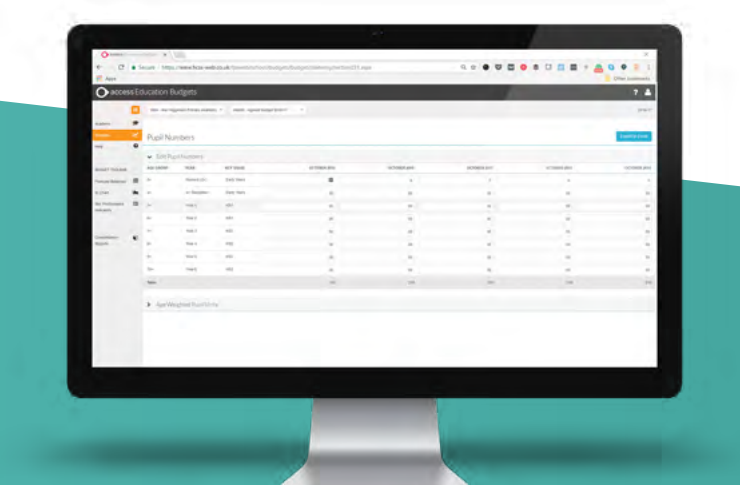


Reporting and returns

Quickly generate easy to understand reports for key stakeholders, including income and expenditure, monthly staffing profile and pupil reports.

Access Education Budgets reports comply with ESFA and DfE legislation and help academies submit ESFA budget forecast returns.

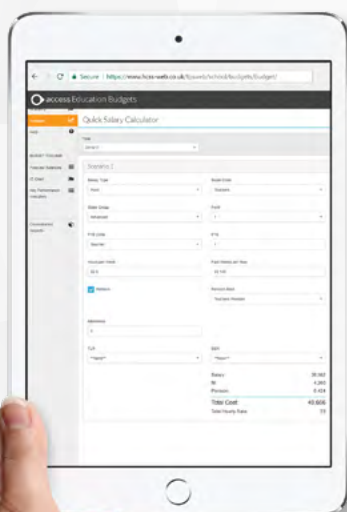
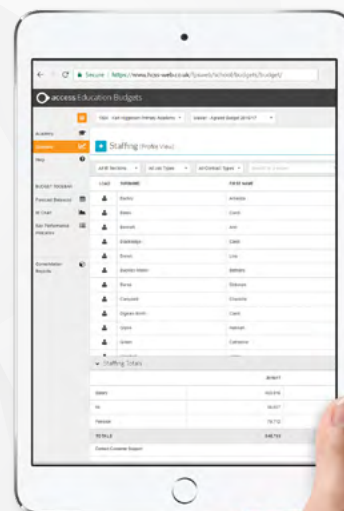
The new Governors report combines your forecast budget information with your actual income and expenditure commitments. This can be presented at the highest level or down to individual ledger codes. The format supports the DfE requirements and provides an easy to understand report for all of your governors.



Calculate staffing costs

Staffing cost and pay adjustments

Teaching and support staff costs and adjustments are calculated for you, taking into account multiple contracts, scales, points / awards, FTE hours, pensions, increments and allowances such as maternity, paternity or sickness pay, and using the latest National Insurance rates and threshold values. This allows you to easily analyse salary, National Insurance and pension costs by month or year.

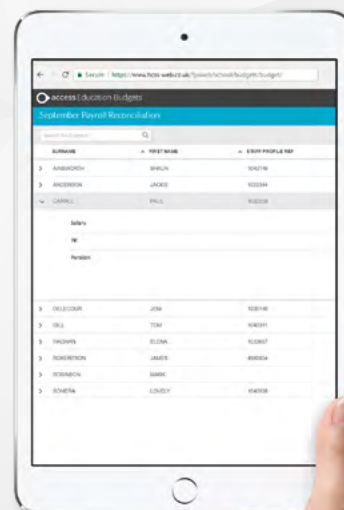


Quick salary calculator

The quick salary calculator enables you to calculate the full cost of employing a new member of staff, compare costs for different staff, and calculate the impact of pay adjustments. It's perfect for recruitment, curriculum planning and reviewing staff contracts.

Payroll reconciliation

Import your monthly payroll file to automatically reconcile expected and actual monthly payments and see an up-to-date view of cost-versus-budget variances against critical fields such as total pay, pension payments and National Insurance.



Supporting multi-academy trusts

Access Education Budgets comes with a number of special features that help to support the broader financial management requirements of multi-academy trusts.

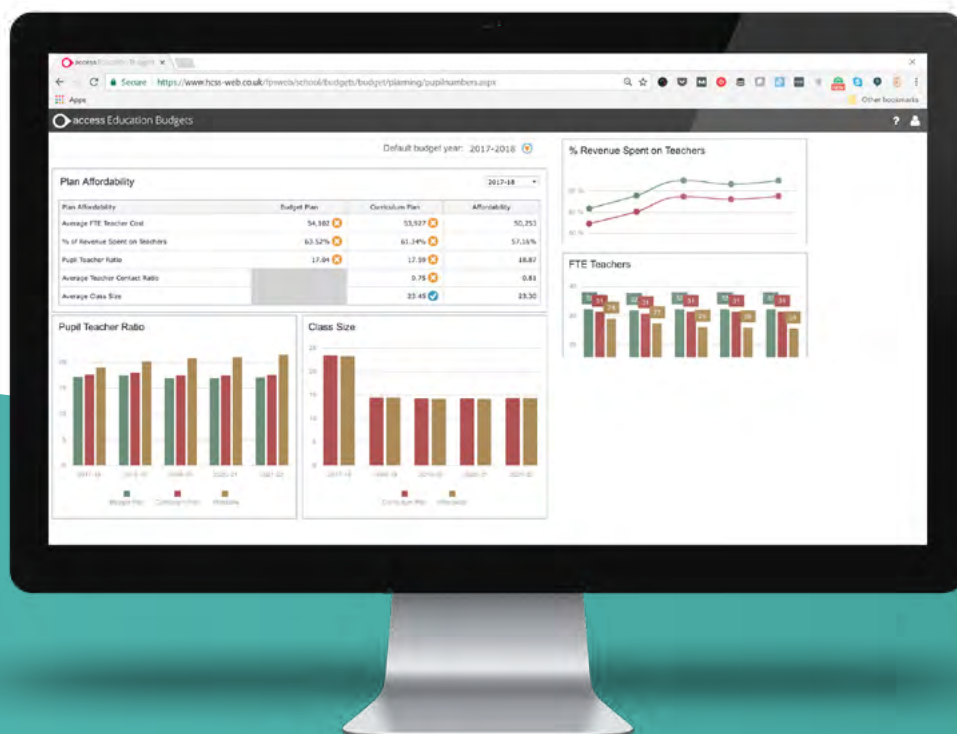
- Produce plans and reports at a trust or school level, or select a specific group of schools (for example, all primary or all secondary-stage schools) for your reports
- Set user permission controls for individual academies, allowing both flexibility and control
- Scale the software as your academy trust grows and takes on new academies, plus add unlimited users at no extra cost

Integrated curriculum and financial planning

Access Education Curriculum is a flexible planning tool designed to help you create detailed five-year forecasts, building in your curriculum requirements and staffing resources. It can be used for both primary and secondary education.

You can accurately model different curriculum and staff scenarios to be confident you're making financially viable decisions in the short-, medium- and long-term.

A visual KPI dashboard lets you view pupil/teacher ratios, teacher FTEs and average class sizes at a glance, and a range of reports allow you to share critical information with key stakeholders, for example staffing costs by subject.



Introducing Access Workspace

The Access Education software suite is brought together on Access Workspace, providing all your school software in one place, driving efficiency and engagement across your whole educational establishment.



Your personal dashboard

Access Workspace offers a fully customisable interface and drag-and-drop personalisation, meaning you can stay on top of all your different applications from one place.



Great team working

Powerful communication and collaboration tools make it easy for teaching and non-teaching staff, parents, pupils and governors to share information, helping connect the finance team with key stakeholders across multiple schools, boosting efficiency and productivity.



Data insight

Access Workspace provides insightful analytics across the full product suite, providing simple dashboards to represent your standard KPIs, with the opportunity to develop bespoke dashboards for more complex reporting requirements.



Powerful apps

Access Workspace apps make it simple for everyone to complete tasks easily and find information quickly. Team members can easily self-serve, choosing apps which support the specific tasks they do most often.



Access Education

For over a decade, schools, academies, multi-academy trusts and local authorities have benefited from our extensive knowledge and understanding of the sector.

The Access Education software suite provides efficiency and engagement across your whole educational establishment. From finance and curriculum-based planning, through to HR, payroll, recruitment and screening, hosting and facilities management, all your school's software is brought together in one place on Access Workspace.

And if you need any help, our team of Education experts are on hand to provide tailored support and training during implementation and beyond.

Over 7,500 schools and academies across England and Wales – that's one in three – choose Access Education to transform the way they work, giving them the freedom to provide outstanding education.