

How schools in North Yorkshire make day-to-day accounting simple with Arbor Finance

“ Arbor Finance is very intuitive, it does exactly what you need it to and it’s web-based, so you can access it from anywhere.

Helen Otter

We spoke to the NYES Financial Management Services team and two School Business Managers in North Yorkshire about how they use Arbor Finance to make day-to-day school accounting and finance simple and straightforward.

About NYES Financial Services

NYES Financial Management Services provide a range of financial support services to 200 schools using Arbor Finance in North Yorkshire.

Their support services range from providing a full bursar service, to supporting on budget planning and monitoring, and assisting schools with their monthly and end of year reporting.

We spoke to Helen Otter and Helen Simpson at NYES Financial Services. The team know Arbor Finance inside out, and Helen Simpson is on the ground with schools every day.

“It’s easy to use, it’s easy to pick up, and you don’t need extensive amounts of training to get the hang of it.”



HELEN OTTER, Deputy Head of Financial Management Services, Schools and Academies
NYES Financial Management Services



HELEN SIMPSON, Financial Consultant, Schools and Academies
NYES Financial Management Services



Schools using Arbor Finance: 200



Located: North Yorkshire



Support: NYES Financial Management Services



Designed for LA schools

When the North Yorkshire Council schools first started using Arbor Finance, the NYES Financial Management Services Team worked closely with the Arbor Finance team to make sure their schools were set up to report in the format the Local Authority required.

With Arbor Finance, both statutory and custom reporting is a breeze. Helen simply logs in to the system and exports the bank reconciliation, VAT report, and CFR with the click of a button.

“It’s a seamless process and it’s very straightforward, and we don’t need to do any manual inputting. It takes about a minute to pull a report.”

Not only is Arbor Finance easy to use, its easy to fix any mistakes. Some of the NYES team’s favourite features are the ability to code correct a transaction that’s been posted to the wrong budget code, and the ability to reset the system to an earlier point in time.

Knowing you can easily undo an error gives you total peace of mind, and as Helen comments, “we’ve never had an issue that we couldn’t sort out”.

Maintaining work life balance

The NYES team are able to manage their time more effectively because Arbor Finance is cloud-based. Instead of going into schools and needing to take over the office staff’s desk space, Helen is able to take advantage of working from home, and reduce time spent commuting between schools:

“Because it’s cloud-based it’s brilliant, and I can do a lot of the work I used to have to do in school, at home. I’ll go into the school to do processing work, like inputting invoices and doing bank reconciliations.

When I get home, I’ll do my budget monitoring work, where I’m looking at analysis codes and tracking spend in more detail.”

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We found with other finance systems you needed to go into a thousand different areas to get to where you want. Arbor Finance is just so refreshing in comparison to other systems - we can’t sing its praises enough.

Helen Simpson

Spotlight on: North Yorkshire School Business Managers supported by NYES

Le Cateau Community Primary School

SUSIE WARRINER
SCHOOL BUSINESS MANAGER



Ages: 3 - 11
Students: 462

Susie has worked at Le Cateau for six years, and her responsibilities are wide ranging. From procurement and contracts to staffing and HR, finance is just one element of Susie's day. In a large, busy primary school, every day is different, and Susie loves that everything in Arbor Finance is quick and easy.

"I use Arbor Finance every day, and it's a superb piece of software. I can't think of anything that needs improving, but if I did, I'd know that I could go to Arbor and they'd take the feedback onboard."

TIG Federation

CARRIE DREWER
BUSINESS MANAGER



Ages: 3 - 11
Students: 179

Carrie works as a Business Manager across the three primary schools in the federation. Carrie uses Arbor Finance to manage the finances for each school, including two schools that share a budget.

Before working as a Business Manager, Carrie had experience in project management and budget monitoring, but no formal background in finance. Carrie found that Arbor Finance was "easy to get your head around as a non-finance person" and was able to quickly get up to speed on how to use the system.

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When I used a legacy finance system, reconciling month end would be an arduous task. Whereas now with Arbor Finance, it is so much easier.

Susie Warriner

Are you an LA team or maintained school reviewing your MIS and Finance options?

Get in touch at
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