



MOORE

MOORE (SOUTH) EDUCATION BROCHURE





MOORE



Moore (South) – Our Education Philosophy

Having been in the Education sector for more than 20 years, Moore (South) has an in-depth understanding of the requirements, demands and potential pitfalls of the sector. That is why we have a range of passionate partners and managers with several years' worth of experience in helping clients reach their respective objectives and goals while also overcoming the challenges that come with them.

We build fantastic rapport with our clients allowing us to provide services tailored to fit your organisations resources, limitations and ambitions. The collective skills of our evergreen education team has allowed us to help multiple establishments across the south of England with challenges such as structural changes, funding issues, compliance and many more. We have always strived to develop ourselves so that we can cater for our clients' needs whenever required.

Our priority is your needs. Your team will be able to have a constant dialogue with us to express your requests and opinions throughout the year, not just during compulsory catch-ups.

How we can help

Due to our extensive understanding of the Education sector we are able to assist Academies, Further & Higher Education Institutions, Independent Schools as well as Private Training Providers with the knowledge, tools and unrelenting support needed to survive and excel in the current environment. By partnering with us we can assist with training, the constant and infrequent challenges and adding value through positive reporting.

Although committed to tackling current issues any of our clients may face, we also plan ahead to ensure all of our clients have an established and long term future by omitting the potential threats that come from a lack of understanding and future planning.





The team you will be partnered with

Moore (South) is one of the premier education teams in the south of England with offices in Chichester, Guildford, Isle of Wight (Newport), Salisbury and Southampton. Our team comprises partners and managers who are dedicated and passionate about education that work with clients of all sizes. Through all that we do, our aim is to help our clients achieve their ambitions.

Our dedicated team will be by your side during every step of the decision making process providing pragmatic solutions based on experience and expertise. No matter what you require from us, we pride ourselves on being able to produce informative solutions and answers in a timely manner.

With five specialist Academy partners supported by a dedicated education team, we currently act for over 30 Academy Trusts, covering an outreach of over 100 schools, providing either internal or external audit services.



Audit & Assurance

Our Education audit and assurance process is a complete service, with all aspects allowing governors and other interested parties to have confidence in the information being presented. This process can come in many forms and we take great care to ensure that we deliver value whilst complying with the regulatory requirements and standards expected of a top audit firm.

We recognise that comprehensive and thorough planning is critical to the success of the audit. A key element of our approach is to agree on your requirements and expectations at an early stage. We will mark milestones and key dates with you and ensure we deliver to the deadlines agreed.

A clear and concise report is provided at audit completion providing a summary of the audit process. This includes benchmarking against other Trusts, common issues arising in the sector and horizon scanning into the next financial year. We act as a critical friend.

Recommendations are discussed with management throughout the audit process. Only practical and realistic points are reported. We understand the challenges and limitations the Academy staff face and therefore avoid advising solutions which are unachievable.



Tax & VAT

Academy Trusts are increasingly looking for other streams of generating funds due to tightening of grant funding. These other income streams may have tax implications. The team will be able to help with multiple matters such as PAYE advice, VAT planning, Gift Aid administration, Tax health checks, trading structures, among other aspects.

Internal Scrutiny

We will be able to provide a complete internal scrutiny package to ensure all aspects of internal financial management and control, as required by the Academy Trust Handbook, are complied with.

Through our contact and discussions with various audit and risk committees, we are able to keep you up-to-date on the latest thinking behind more bespoke programmes of tests to enable a more effective reporting of operations.

We are currently working with various schools on risk management and compliance procedures as a result of COVID-19.

Other topics have covered procurement arrangements, catering, lettings and the reporting function to the governing body.

Management accounts

Our team works with the finance team and audit/resource committees to address areas that are of concern and are having an impact on the effective functioning of operations. Our experience on controls and systems reviews also extends to many public sector organisations. With this level of expertise, we are able to share best practices and benchmarking of systems and control processes that arise from our work.

The team is particularly focused on helping create management information tools to help monitor an organisation's progress including assessing Key Performance Indicators (KPIs). Dashboards are an effective way of summarising detailed reports and showcasing relevant KPIs for both financial and non-financial sets of management information.



$$\frac{1}{2} \left[(y + xy^2) dx - x dy = 0 \right]$$

$$\left(\frac{1}{y} + x \right) dx - \frac{x}{y^2} dy = 0$$

$$y_0 + \int_{x_0}^x f(x, y_0) dx$$

$$y_0 + \int_{x_0}^x f(x, y) dx$$

$$> f(x)$$

One of the key benefits of dashboards is the ability to present the information in an understandable manner for all involved regardless of expertise. We will work with you to select the KPIs which are most important and relevant for you as well as what governors and committees would like to be kept aware of.

Moore (South) have also previously acted as interim Business Manager and Finance Director where there has been a short time vacant role. During this time our staff have learnt the operational complexities of Academy Trusts and have developed management account reporting techniques that are practical and useful.

Governance & Business Advice

Accountability has to be at the forefront of any organisation within the education sector.

Moore (South) can help your organisation to instigate and develop effective governance and management functions in order to ensure compliance with regulatory requirements while also improving management processes. Some of our services include skill audits, performance benchmarking, risk management and governor training.



Growing Trusts

As the Trust expands, there are different demands on the Board and the Senior Leadership Team.

As well as ensuring there is a good educational fit and buy-in by staff and governors, robust due diligence on schools joining the Trust is paramount. We are able to undertake such due diligence and ensure minimal disruption to both parties. As part of this exercise we look at various financial and non financial considerations and give first hand indicators on risk factors the Trust should take into account. At the end of our visit, we provide a comprehensive report for presentation to the Board.

How else can we help?

Working with Moore (South) enables you to work with a team that can offer a highly personalised level of care but also has access to a UK network should it be needed.

The Moore Network, with over 260 firms globally and 38 in the UK, grants Moore (South) access to be part of one of the world's top global accounting and consultancy networks. This allows Moore (South) clients to benefit from attributes such as top level HR consultancy, Fundraising reporting and Consultancy as well as insight from GDPR experts.



Fundraising reporting and consultancy

The Moore Network allows us to work with Moore Kingston Smith (MKS) who will be able to provide additional support to clients in practices such as fundraising and establishing new fundraising activities. The Moore team will also be able to help schools develop their existing impact reporting and consider new approaches with the aid of impact measurement products.

The teams our clients work with have high focus on achieving international standards and strive to be consistent with the principles of social return on investment.

GDPR & Data Security

Moore Global have joined forces with ClearComm who provide easy to implement solutions for schools to ensure they are fully compliant in their operation, they are also able to train key personnel to ensure that the school will be able to remain compliant.

HR Consultancy

Moore (South) clients will have access to Moore Kingston Smith's HR team and Employment consultants who will be able to help deliver positive solutions to all features of personnel management. The HR and Employment consultants will also be able to assist with aspects such as:

- HR Audits
- Employee and Contractor benefits
- Employee Surveys
- Pay Benchmarking
- Recruitment of specific roles

Please contact us for a no-obligation chat to see if and how Moore (South) can help you and your organisation.

Chichester

Telephone: 01243 531 600
Email: chichester@mooresouth.co.uk

Guildford

Telephone: 01483 538 881
Email: guildford@mooresouth.co.uk

Isle Of Wight (Newport)

Telephone: 01983 825 000
Email: newport@mooresouth.co.uk

Salisbury

Telephone: 01722 355 182
Email: salisbury@mooresouth.co.uk

Southampton

Telephone: 02380 330 116
Email: southampton@mooresouth.co.uk



Our Education Team

Ann Mathias

Email:

ann.mathias@mooresouth.co.uk



Robert Macdonald

Email: robert.macdonald@mooresouth.co.uk



Louise Hastings

Email:

louise.hastings@mooresouth.co.uk



Danielle Griffin

Email:

danielle.griffin@mooresouth.co.uk



Esme Shakeshaft

Email: esme.shakeshaft@mooresouth.co.uk



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