

**Liberata**

 School Services

Trusted, expert  
services for schools  
and academies



Who we are

Liberata innovates with services and technology to help customers simplify complex tasks and processing activities. Our approach delivers greater value and improved outcomes to free up customers' time and allow them to focus on their core activities.



## Reinventing School Services

Liberata has been providing support services to schools for more than 20 years.

Using our seamless support services in HR, Payroll, Occupational Health, Employment Law, Pensions, Finance and Audit, you will benefit from our team's in-depth knowledge and commercial experience to ensure you get real value for money for your school or academy.

Whether it's ensuring your staff are paid on time, taking care of your pension responsibilities, supporting

your recruitment process, managing your employee relations issues or providing financial support and advice to ensure that your budget is used efficiently and effectively, we provide access to trusted expertise when you need it most, ensuring compliance and freeing up management time.

Liberata provides a range of flexible and personalised services to over 500 schools and academies in England using dedicated resources who understand your needs.

## Proud Sponsors of Bromley Youth Music Trust

"We are delighted that Liberata have chosen to work with Bromley Youth Music Trust (BYMT). We appreciate both their financial and pro bono advisory support and our shared vision of providing the highest quality standards to schools".

**Ian Rowe, Principle, Bromley Youth Music Trust.**

# Reinventing School Services

Offering services covering budgeting, accounting, HR consultancy, Recruitment and a fully managed payroll and pensions service. We provide timely and consistent advice on the myriad of issues facing schools and academies.



## Finance challenges for schools

- Understanding the impact of the National Funding Formula
- Support the increasing financial challenges being faced by schools, with particular focus on long term planning
- Financial changes for schools converting to academy status
- Bespoke financial support tailored to support your needs



## HR challenges for schools

- More efficient use of resources to meet changing needs of schools/academies and budgetary constraints
- Proactive management of sickness absence
- Compliance with new regulations such as Disqualification by Association rules and Shared Parental Leave
- The TUPE transfer of staff for schools converting to academy status



## Payroll and pensions challenges for schools

- Implementing changes to the Teachers' and Local Government Pension Schemes
- Dealing with tax and NI changes
- Changes to childcare schemes
- Auto-Enrolment



# Finance & Audit Services

The Schools' Finance Team ensure that financial help and advice is available to all schools and academies and is committed to providing high quality advice and support to all its customers.

With a team of experienced staff who have worked with schools for a number of years, and with most having previous experience of having worked in a school, we are well placed to offer a wealth of knowledge and expertise on the financial issues facing schools and academies. The Finance Team includes 2 experienced auditors and is able to offer a bespoke Internal Audit service to academies.

The Finance Team work with finance staff, Business Managers, Head Teachers and governors and offer support by phone, email or via a one to one visit to your school. We also hold termly forums for finance staff to provide additional information and updates on relevant "hot topics".

The Finance Team provides support to guide schools and academies through the annual budget setting and monitoring, to include the submittal of any DfE and LA returns and can be tailored to reflect your school's individual needs. We also provide specific support around long term financial planning, supporting schools to produce multi-year budget plans to allow them to focus on current and future budget challenges.

Schools can choose from a range of levels of support from Bronze through to Platinum depending on their level of need. Any additional support, including training needs can be purchased through "pay as you go" services to support your school.

- Budgetary control, including budget setting and monitoring
- VAT compliance
- Compliance with local authority financial regulations
- End of year procedures
- Support with production of annual accounts
- Compliance with company and charity accounting requirements
- Consistent financial reporting
- Benchmarking
- Annual licensing requirements
- Cash flow services
- SIMS FMS Support
- HCSS budget planning software
- Bespoke bursary / chief financial officer support
- Voluntary Fund Audit service
- Internal audit service for academies and maintained schools
- Finance training for governors
- Specialist recruitment support and training
- Support to produce Finance Procedures Manual and relevant financial policies
- Support/guidance on converting to an Academy



500+

Schools worked with nationally

ISO27001 Accreditation

in Information Security ensuring secure system and processes in place to protect personal information

# HR Services

The HR Services Team provide HR advice and support to Head Teachers, senior managers and governing bodies. Offering a tailored approach with a named HR consultant, advice can be accessed via an advice line, HR manual or with a personal visit. The advice is tailored to your specific situation and is available when you need it. Our qualified consultants have a wealth of experience of providing high quality advice within the education sector and are passionate about their work.

We provide a comprehensive recruitment and administrative service to ensure legislative compliance in the operation of HR policies and procedures and offer a range of risk assessed options so you can make an informed choice about managing and resolving issues.

We also provide high quality administrative support which includes provision of contracts and advice on pay and conditions of service. From recruitment tasks to pre-employment checks to liaising with the Department for Education and training for school administration teams we can support you across the many diverse areas of HR.

Liberata can also offer an Employment Law service which will draft Settlement Agreements for you and provide representation and support at Employment Tribunals as well as legal support on complex issues. This service is provided by EEF through our HR Consultants to provide a holistic approach.

## HR Consultancy

- Disciplinary, capability, sickness absence, grievance (case management)
- Management of change, restructures and redundancy programmes
- Attendance management
- Conflict resolution
- TUPE transfers
- Pay and grading issues
- Recruitment good practice
- Compliance with equal opportunities legislation
- Redundancy proposals
- Trade Union representatives
- Seeking medical advice on the school's behalf

- National conditions of service and advising on statutory changes
- Becoming an Academy/Free School
- Standardised and bespoke training solutions
- Preparation of sensitive documents
- Legislation via regular updates
- Best practice through a HR Handbook
- HR advice and support on Employment Tribunals and Settlement Agreements
- Employment Law



## Recruitment & Employment Service

- Placement of job advertisements
- Processing staff appointments, contract variations and terminations
- Pre-employment checks including right to live and work, DBS and Disqualification by Association checks
- Qualification checks and assessment of General Teaching Council (GTC) and Qualified Teacher Status (QTS).
- Administration of employee benefits and entitlements including maternity, paternity and absence
- Provision of guidance on national and local conditions of service
- Responses to employment enquiries from external organisations, public and statutory bodies (eg bank and building societies, Department for Education)
- Maintenance of confidential personal files
- Training of school administrative officers new to HR Administration

# Payroll & Pension Services

The Payroll & Pensions Service is administered by a dedicated and experienced team.

Providing in depth knowledge of applying teachers' pay and conditions of service we provide a personalised service with a dedicated team delivering phone, email and face-to-face support with a named account manager. With an internal link to Pension Services and integration with HR we can reduce the administrative burden on your school while ensuring you are compliant with the latest legislation and processes.

Our team support all procedures regarding Auto-Enrolment for academies, voluntary aided and foundation schools where required and play an important role in administering and supporting the Teachers' Pension Scheme and Local Government Pension Scheme. We calculate and deduct contributions and pay these monthly to the scheme administrators.

Our Payroll & Pensions Team process new starters joining the scheme and manage any changes which impact on the pension scheme during their employment. They will also manage the employee's retirement.

We administer the pension scheme on London Borough of Bromley's behalf and will make timely payments to the pension scheme and AVC Administrators on the school's behalf and ensuring a smooth transition with transfer of service.

## Payroll

- Gross and net pay preparation of salary, overtime and expense claim forms for contracted and casual/ supply staff
- Calculation and reporting of all statutory and third party deductions

- All sickness, maternity, paternity and adoption payments
- Pressure sealed payslips delivered directly to schools
- Creation of BACS payments directly to employees' accounts and to third parties
- Application of step progression and pay awards
- Timely monthly payments to HMRC and pension providers
- Secure exchange of data with HMRC via RTI (Real Time Information) including starter and leaver notifications and electronic filing of annual returns
- Preparation of P60s and P11Ds for employees
- Administration of salary sacrifice schemes as required

## Pensions

- Support with monthly LGPS and Teachers' Pensions administration including annual service returns
- Calculation of contributions due to LGPS and Teachers' Pensions
- Preparation of annual contribution statements to pensions scheme administrators
- Provide support for employers' new statutory responsibilities for Auto-Enrolment of appropriate staff into a pension scheme
- Provision of monthly management reports as required

## Occupational Health

Our partner, Maitland Medical can offer a range of services which are flexible and tailored to the needs of your school and provided by a team of fully qualified medical staff.

1 m+ payslips produced per year

500+ payrolls run per year



## Reinventing School Services

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### Helping schools and academies to access trusted, expert advice when they need it most

Working with us we can support you with:

- Expert, trustworthy advice to help you resolve issues quicker
- A tailored approach when you need it most in a way that you will understand without unnecessary jargon
- Improving quality of processes ensuring your staff are paid on time, debts collected and pensions managed leaving you free to focus on education
- Managing risk ensuring compliance is met in line with HMRC changes and new legislation
- Reducing administration across key support functions.
- Delivering a smooth route to Auto-Enrolment and Real Time Information

#### We provide School Services in the following locations

Bromley, Bexley, Croydon, Dulwich, North Somerset, Sevenoaks and Worcester Councils



## Testimonials

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I have found the support and guidance from the Schools Finance Team invaluable. Their depth of knowledge is considerable and their desire to share this knowledge and the sufferance needed to do it is commendable. It helps that many in the team have previous experience of working in schools and this has helped foster their empathy of the needs of those of us in schools.

*School Business Manager, St Mary's Catholic Primary School*

I have worked at Rectory Paddock/Riverside Schools for almost 13 years. During this time I have always worked as the Human Resources contact at the school. This has involved working extremely closely with the Human Resources and Payroll Department based in Bromley, originally under the London Borough of Bromley flag and then latterly working for Liberata. During this time period there has been enormous change affecting schools. Legislation has become more demanding, DBS checks are more keenly checked, a Single Central record now has to be kept and updated and as schools are having to keep a tight control on their budgets, all extra payments are vetted carefully. Despite this and the obvious personnel changes that have taken place over the years, the staff who work in Human Resources and Payroll are consistently professional, friendly and effective. My emails are always answered promptly and my telephone enquiries responded to in a friendly and efficient manner.

I really value the service that this department provides.

*Administrative Finance Officer, Riverside School*

As a newly appointed Head, I have found Liberata HR at Bromley to be an invaluable source of guidance in staffing related matters. The team clearly has a wealth of experience in a broad range of issues and I cannot recommend them highly enough for the professional support they have provided to Darrick Wood School.

*Head Teacher, Darrick Wood School*

I have been using Bromley Payroll and HR for many years. I have always found them extremely accurate and reliable with a wealth of knowledge. Email/telephone enquiries are answered immediately and the advice is faultless. Current payroll reports are outstanding and the level of information provided has meant my workload has decreased! I would not hesitate to recommend this service. Thank you.

*School Business Manager, Biggin Hill Primary School Academy*

As a Head Teacher the Bromley HR services have been an extremely valuable resource in helping me to establish good HR practices within the school, as well as providing helpful advice and guidance on more complex issues when required. Knowing that I can rely on the support of an experienced HR professional gives me peace of mind when navigating HR decisions in the workplace.

*Head Teacher, Langley Park School for Boys*

# Liberata

 School Services

Our service guarantee



## More flexible

Access to experts when you need them



## More reliable

Secure, resilient services and advice



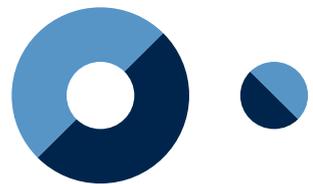
## More efficient

Free up management time



## Better outcomes

Smoother running of schools and academies



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