

Case study

Belmont Preparatory School, Dorking, UK

About the school

Founded as a school for boys in 1880, Belmont Preparatory School moved to its current 65-acre site near Dorking in the 1960s. It is now a co-educational school for pupils aged 2-13 years with a family-friendly feel to everything it does, from day education for all children to optional weekly boarding or flexible boarding arrangements from the age of seven upwards. This allows Belmont to meet the various requirements of parents and to stay focused on its ethos of 'Achievement through Happiness'.

Website

www.belmont-school.org

Bursar

Sarah Hall



It feels like working in a family with a very close team." So states Bursar Sarah Hall, when describing a typical day at Belmont Preparatory School, near Dorking, UK.

The school offers a very flexible approach for parents and pupils. Day education is available to all, but tailored boarding arrangements are also in place that provide for children to stay as desired. So for example they might board for a night or two one week, but remain at the school for whole weeks at other times. Sarah says that this flexibility is perfect for parents who have variable work commitments – and it has other benefits too. "Many children begin as day pupils, then start dipping a toe into boarding at Year 5 or Year 6 – the children enjoy it and have lots of extra-curricular activities in which they want to participate."

This kind of flexibility of course brings more work to the bursary. Sarah is a trained auditor, with experience in printing, publishing and stock-broking. She joined Belmont in 2010 and used the school's long-standing Double First Accounts package and Engage management information system to handle finances and administration. In mid 2014 she opted to spearhead a pilot installation of Engage Accounts, even while it was still in the final stages of development.

"I reconciled all of my control accounts and went live with Engage Accounts straight away because I trusted it," Sarah explains. "I like the functionality and full integration with Engage. For example if I am in the bank reconciliation and find that I have forgotten to post a parent receipt in Engage, I can correct that, then refresh my bank reconciliation without having to leave it. Or I can add a supplier when inputting invoices without having to close anything down. The live functionality and the ability to pull things straight through from

Engage is absolutely brilliant.

"Engage Accounts is very intuitive and easy to use. I have a new assistant and spent less than an hour showing her the system. Now she just runs with it, even though she had just returned to office work after a long break.

"We both use the purchase ordering system. My assistant inputs and I authorise, which means I can check all of the coding before the PO is sent. It also means I don't have to sit there reconciling a pile of invoices as they arrive afterwards. Now we have a record of the goods being received – the controls are all there.

"At the outset I took less than four days to set-up the fixed asset register and ensure it mimicked, as closely as possible, the spreadsheets I had been keeping. Now, the system deals with the fixed asset register and depreciation journal in the background. I've just ordered some beds for the dorm – that's the last time I need to think about them. Routine tasks like this just happen automatically.

"I'm looking forward to working with budgets in Engage Accounts as I know this area has been written to suit the specific requirements of schools. It's going to be great to produce budget reports for individual staff that are meaningful. I am already exporting formatted data in Excel."

Sarah has no regrets about being an early adopter of Engage Accounts. "I've really enjoyed doing it. Jo McGrath (in the dedicated Double First Finance team) has been fantastic. And your developers have listened – they've asked for an explanation of why something should change, considered my ideas – and responded."



For further information

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